



February 27, 2023

Sarah Koligian, EdD
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Dear Dr. Koligian:

School Services of California Inc. (SSC) is pleased to provide the Folsom Cordova Unified School District (District) with a proposal for a Reorganization Feasibility Study involving the potential reorganization of the District into two separate unified school districts. The primary purpose of the study is to evaluate the proposed reorganization against the nine statutory criteria governing school district reorganizations.

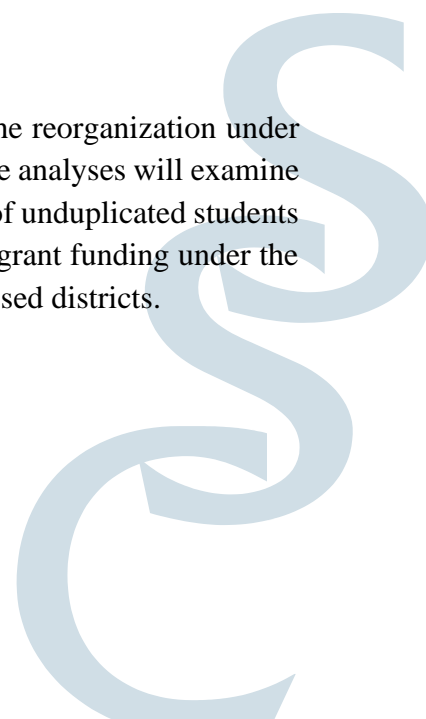
Study Objective and Scope

Nine Statutory Criteria Governing Reorganizations

The study will assess the proposed reorganization against the nine criteria governing district reorganizations specified in Education Code Section 35753(a), to be performed in accordance with the California Department of Education School District Organization Handbook, Chapter 6: Legal Criteria Governing Reorganization Proposals.

Financial Analysis

SSC will conduct analyses of the revenue impact of the reorganization under the Local Control Funding Formula (LCFF) model. The analyses will examine the average daily attendance, the resulting percentage of unduplicated students that would be eligible for supplemental/concentration grant funding under the LCFF, and the total funding available to the two proposed districts.



Study Methodology

SSC will rely on data provided by the District for its analyses. The procedures may include telephone or video interviews with District staff, including staff responsible for overall leadership and management, business services, facilities, educational services, etc.

This study will also rely on a review of key documents from the District, including district budgets, enrollment projections, property tax data, outstanding bonds, board policies, and other related documents.

At the conclusion of the study, the consultants will provide a written report, which presents findings and recommendations, if any, along with the analyses of each of the nine criteria. SSC will provide a copy of the report in draft to the District for review prior to finalizing the report.

Consultant's Report

The report will provide a comprehensive study of the proposed reorganization. The report will evaluate the fiscal and organizational issues that will likely impact the resulting two districts should reorganization occur. The report will highlight both the advantages and disadvantages of the proposed reorganization. Following the delivery of the final report, members of SSC's team will also be available to present our findings and recommendations at a District Governing Board meeting.

Study Timeline

SSC will commence work on the proposed services at a mutually arranged date. The final report is expected to be completed within eight to ten weeks following receipt of the required documents necessary to complete the project.

SSC's Consultants

Staff for this project will include at least two consultants from SSC. All persons who will be assigned are full-time career employees of SSC and as such are available for daily professional communication and attention, as required of a project of this scope.

Brianna García, Vice President, has worked with school districts to strengthen their organizations by conducting organizational reviews, comparative analyses of school district resources and staffing, facilities reviews, and charter petition reviews. She has provided guidance to and completed studies for school districts looking to reorganize and those seeking to consolidate

or surplus school sites through the 7–11 process. Brianna has extensive experience related to planning and development of public school facilities, including charter schools and Proposition 39 (2000). She has more than 15 years of professional experience in public K–12 education, has worked as a Facilities Development Manager for the Los Angeles Unified School District, and has completed the University of Southern California Rossier School of Education School Business Management Program earning designation as a certified Chief Business Official. Brianna graduated from the University of Southern California with a Bachelor of Architecture, a Master of Planning, and a Master of Real Estate Development.

Linette Hodson, Director, Management Consulting Services, has 32 years of experience in public education, including 18 years at an executive cabinet level. In each and every role, her focus has always been to improve educational outcomes for students. She has spent the past decade in a Chief Business Official (CBO) role; and as CBO, she had direct oversight of the human resources department, including serving as the lead negotiator for more than 15 years. Linette also spent more than 10 years as an Assistant Superintendent of Student Services/Special Education. Her career path includes being an elementary school teacher, curriculum resource teacher, and site administrator. Linette has extensive training and experience in collaboration and leadership building strategies, including: alternative dispute resolution, administrator coaching, facilitation, interest-based bargaining, and implementation strategies. Linette received a Bachelor of Arts degree in Elementary Education from Central College in Pella, Iowa, and a master’s degree in Education Administration from California State University, Bakersfield.

Wendi McCaskill, Director, Management Consulting Services, has two decades of broad experience in K-12 education finance and fiscal policy. Wendi is an expert in the attendance accounting and instructional time requirements of local educational agencies (LEAs), which play a critical role in independent study as well as the Local Control Funding Formula, other apportionments for LEAs, and the impacts of emergencies such as fires, floods, and the pandemic on LEA budgets. Immediately prior to joining School Services of California Inc. (SSC), she served as the Associate Director of the School Fiscal Services Division at the California Department of Education (CDE) where she oversaw the apportionment of over \$50 billion to LEAs through the Principal Apportionment and the CDE’s guidance on attendance accounting and instructional time. Wendi holds a Bachelor of Arts and a Master of Arts in Political Science, both from San Francisco State University.

Matt Phillips, CPA, Director, Management Consulting Services, provides support to school districts for fiscal-related matters such as budget reviews, salary schedule analyses, organizational reviews, and negotiations, including factfinding services. He also participates in presenting workshops across the state on a variety of topics including collective bargaining, district budgeting, federal compliance, and auditing. His accounting and auditing background, experience working in a school district, attainment of Certified Public Accountant license, and completion of the Fiscal

Crisis & Management Assistance Team Chief Business Official (CBO) Mentor Program resulting in the California Association of School Business Officials (CASBO) CBO certificate all provide the foundation for his expertise. Matt graduated from the California State University, Chico, with a Bachelor of Business Administration with emphasis in Accounting.

Cost of the Proposal

SSC proposes to perform the study, the terms of which are described above, for \$72,500, plus expenses. “Expenses” are defined as actual, out-of-pocket expenses, such as travel, meals, shipping, and duplication of materials. The cost of the study includes one presentation to the Committee.

If additional meetings or presentations are required that are not described in this proposal (for example, an additional presentation), a charge of \$310 per hour, per consultant will be billed in addition to actual and reasonable expenses. SSC will submit monthly billings for services associated with the project.

After reviewing the proposal, if you decide the proposed scope should be expanded or contracted, we would be happy to make modifications and provide a revised estimated fee. If the proposal meets with your approval, please let us know and we will send you the Agreement for Special Services via DocuSign for signature. Our proposal is valid for 60 days from the date of this letter.

We appreciate the confidence you have in our firm and would be pleased to discuss the proposal at more length. Please call if you have any questions.

Sincerely,



Kathleen Spencer
Vice President

AGREEMENT FOR SPECIAL SERVICES
Reorganization Feasibility Study

This is an Agreement between the **CLIENT**, as defined above, and **SCHOOL SERVICES OF CALIFORNIA INC.**, hereinafter referred to as “Consultant,” entered into as of February 27, 2023.

RECITALS

WHEREAS, the Client needs assistance regarding a Reorganization Feasibility Study involving the potential reorganization of the District into two separate unified school districts; and

WHEREAS, the Consultant is professionally and specially trained and competent to provide these services; and

WHEREAS, the authority for entering into this Agreement is contained in Section 53060 of the Government Code and such other provisions of California law as may be applicable;

NOW, THEREFORE, the parties to this Agreement do hereby mutually agree as follows:

1. The Consultant agrees to assist the Client by providing a Reorganization Feasibility Study for the proposed reorganization.
2. The Client agrees to pay the Consultant a fee of \$72,500, plus expenses, upon receipt of billing from Consultant.
 - a. The cost of the study includes one presentation at a District Governing Board meeting.
 - b. “Expenses” are defined as actual, out-of-pocket expenses, such as travel, meals, shipping, and duplication of materials.
 - c. If additional meetings or presentations are required that are not described in the proposal (for example, an additional presentation), a charge of \$310 per hour, per consultant, will be billed in addition to actual and reasonable expenses.
3. This Agreement shall be for the period commencing February 27, 2023, and terminating December 31, 2023. It may be terminated at any time prior to December 31, 2023, by either party on 30 days’ written notice. In case of cancellation, the Client shall be liable for any costs accrued to date of cancellation.

4. It is expressly understood and agreed to by both parties that the Consultant, while carrying out and complying with any of the terms and conditions of this Agreement, is an independent contractor and is not an employee of the Client.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed as indicated below:

By:

To be signed via DocuSign

Sarah Koligian, EdD
Superintendent
Folsom Cordova USD

Date: _____

By:

To be signed via DocuSign

Kathleen Spencer
Vice President
School Services of California Inc.

Date: _____