Meeting Date: February 16, 2012

Subject: Grants, Entitlements, and Other Income Agreements
       Ratification of Other Agreements
       Approval of Bid Awards
       Approval of Declared Surplus Materials and Equipment
       Change Notices
       Notices of Completion

Recommendation: Recommend approval of items submitted.

Background/Rationale:

Financial Considerations: See attached.

Documents Attached:
1. Grants, Entitlements, and Other Income Agreements
2. Other Agreements
3. Approval of Declared Surplus Materials and Equipment
4. Change Notices – Facilities Projects
5. Notices of Completion – Facilities Projects

Estimated Time: N/A
Submitted by: Daniel M. Sanchez, Manager II, Purchasing Services
            Kimberly Teague, Contract Specialist
Approved by: Patricia A. Hagemeyer, Chief Business Officer
GRANTS, ENTITLEMENTS AND OTHER INCOME AGREEMENTS - REVENUE

Contractor | Description | Amount
--- | --- | ---
**FAMILY AND COMMUNITY ENGAGEMENT OFFICE**

A12-00081  
The David and Lucile Packard Foundation  
2/1/12 – 9/28/12: Implement Summer of Service 3 (SOS3).  
The SOS3 project will enroll approximately 500+ incoming 7th and 8th grade students at the eight middle schools that currently have after school programs. Using a youth development and social justice framework, SOS3 will involve students in the planning and implementation of school and community improvement projects tailored to their communities. Projects will examine environmental and health related problems faced by disadvantaged communities (e.g., lack of green space, obesity, lack of fresh fruits and vegetables, safe spaces for outdoor physical activity) and will show youth how to be agents of change who can transform their schools and community. The service learning projects will incorporate literacy and math development, and will include connections to the out-of-doors, healthy eating, healthy lifestyles, and physical activity.

$110,000  
No Match

A12-00082  
The California Endowment  
2/1/12 – 1/31/13: Men’s Alliance Health Program. To support the healthy development of at-risk boys of color by incorporating a curriculum that promotes social and emotional learning into three pilot high schools (American Legion, C.K. McClatchy, John F. Kennedy). A Men’s Leadership Academy team within each school will implement the program and monitor the progress.

$40,000  
No Match

**YOUTH DEVELOPMENT**

A12-00005.2  
California Department of Education  
7/1/11 – 6/30/12: After School Education and Safety (ASES) Program Grant Amendment No. 2. Components include educational and literacy elements focusing on activities that reinforce and complement the academic programs, as well as recreational and youth development. Programs provide safe and constructive alternatives for students at 54 elementary and middle school sites.

Additional Funding of $27,000  
Grant Total = $7,097,306

**EXPENDITURE AND OTHER AGREEMENTS**

Contractor | Description | Amount
--- | --- | ---
**CAPITAL ASSET MANAGEMENT SERVICES**

SA12-00431  
NTD Architecture  
1/20/12 – Completion of Services: Develop a Sustainable Facilities Master Plan using a five step process: 1) Vision: Establish educational program and goals; 2) Evaluate: Audit prior planning and existing conditions; 3) Identify: Program initiatives; 4) Optimize: Alternate solutions and prioritization; and 5) Create: Sustainable master plan.

$1,224,800  
Bond Funds
Strategic Plan: Aligns with Priority III, Organizational Transformation, by focusing on the facilities in which we teach and learn. How we view our facilities, how our facilities optimize teaching and learning, and transforming the district’s assets to support 21st century skills.

APPROVAL OF DECLARED SURPLUS MATERIALS AND EQUIPMENT

<table>
<thead>
<tr>
<th>ITEM</th>
<th>SITE/DEPARTMENT</th>
<th>TOTAL VALUE</th>
<th>DISPOSAL METHOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer Equipment</td>
<td>American Legion High School</td>
<td>None</td>
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<tr>
<td></td>
<td>Hiram Johnson High School</td>
<td>None</td>
<td>Recycle</td>
</tr>
<tr>
<td></td>
<td>Fruit Ridge Elementary School</td>
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<tr>
<td>Audio/Visual Equipment</td>
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<td>Hiram Johnson High School</td>
<td>None</td>
<td>Recycle</td>
</tr>
<tr>
<td></td>
<td>Fruit Ridge Elementary School</td>
<td>None</td>
<td>Recycle</td>
</tr>
</tbody>
</table>

CHANGE NOTICES – FACILITIES PROJECTS
The following change notice(s) are submitted for approval.

CONTRACTOR
Johnson Controls, Inc.

PROJECT and DESCRIPTION OF CHANGE
Bid No. PC12-800-0822, Energy Management Control System Expansion

Change Order No. 1, Standard Change Order
Change in work which does not exceed 10% (cumulative)

$40,269

Initiated by: District
Description: Energy Management System training for additional staff
Description: Additional controls at West Campus
Description: Additional controls at Sacramento High
Description: Add 32 electric re-heat controls with network addressable thermostats

Change Order Subtotal: $40,269

Original Contract: $2,525,210
Previously Authorized Change Orders: $0-
New Contract Amount / Total Change Order %: $2,565,479 1.6%

Contract Time will be extended by: -0- days

3

February 16, 2012
CONTRACTOR                   PROJECT and DESCRIPTION OF CHANGE
David Engineering          Bid No. 702-0420, Rosa Parks Playground Repairs

Change Order No. 1, Unforeseen Change Order $20,440.56
Unknown conditions
materially differ from contract
documents

Initiated by: District
Description: Excavation and removal of
unsuitable material around storm
drain inlets, backfill, paving
Description: Extension of 6" storm drainage $1,900
Description: Raised existing manhole discovered
during demolition $900

Change Order Subtotal: $20,440.56
Original Contract: $42,025
Previously Authorized Change Orders: $0
New Contract Amount / Total Change Order %: $62,465.56 48.6%

Contract Time will be extended by: 0 days

NOTICES OF COMPLETION – FACILITIES PROJECTS

Contract work is complete and Notices of Completion may be executed.

<table>
<thead>
<tr>
<th>Contractor</th>
<th>Project</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>O.C. Jones and Sons, Inc.</td>
<td>Bid No. PC10-700-0530, Luther Burbank High School Field Renovations, Phase I (DSA No. 02-111488)</td>
<td>January 31, 2012</td>
</tr>
</tbody>
</table>
SERVICES AGREEMENT

Date: January 26, 2012

Place: Sacramento, California

Parties: Sacramento City Unified School District, a political subdivision of the State of California, (hereinafter referred to as the "District"); and NTD Architecture, (hereinafter referred to as "Contractor").

Recitals:

A. The District is a public school district in the County of Sacramento, State of California, and has its administrative offices located at the Serna Center, 5735 47th Avenue, Sacramento, CA 95824.

B. The District desires to engage the services of the Contractor and to have said Contractor render services on the terms and conditions provided in this Agreement.

C. California Government Code Section 53060 authorizes a public school district to contract with and employ any persons to furnish to the District, services and advice in financial, economic, accounting, engineering, legal, or administrative matters if such persons are specially trained, experienced and competent to perform the required services, provided such contract is approved or ratified by the governing board of the school district. Said section further authorizes the District to pay from any available funds such compensation to such persons as it deems proper for the services rendered, as set forth in the contract.

D. The Contractor is specially trained, experienced and competent to perform the services required by the District, and such services are needed on a limited basis.

In consideration of the mutual promises contained herein, the parties agree as follows:

ARTICLE 1. SERVICES.

The Contractor hereby agrees to provide to the District the services as described below ("Services"): Develop a Sustainable Facilities Master Plan as outlined in proposal dated January 25, 2012 and attached hereto as Exhibit B.

ARTICLE 2. TERM.

This Agreement shall commence on January 26, 2012 and continue until completion of services, unless sooner terminated, as set forth in Article 10 of this Agreement, provided all services under this Agreement are performed in a manner that satisfies both the needs and reasonable expectations of the District. The determination of a satisfactory performance shall be in the sole judgment and discretion of the District in light of applicable industry standards, if applicable. The term may be extended by mutual consent of the parties on the same terms and conditions by a mutually executed addendum.

ARTICLE 3. PAYMENT.

District agrees to pay Contractor for services satisfactorily rendered pursuant to this Agreement as follows:
Flat Rate: The total payment to Contractor shall be One Million, Two Hundred Twenty Four Thousand, Eight Hundred Dollars ($1,224,800).

3.1 Reimbursable Expenses

Reimbursable Expenses are those actual out-of-pocket expenses directly incurred as a result of Contractor’s performance of service under this Agreement. Contractor may not charge a mark-up on Reimbursable Expenses. Reimbursable Expenses are limited to these expenses related to the Project: Fax, reproduction expense (excluding such expense for reproductions for office use by Contractor and its consultants), postage, messenger, transportation, living expenses in connection with out-of-town travel, long distance communications, and expense of renderings, models and mock-ups requested by District. Reimbursable Expenses do not include mileage or other transportation costs for trips less than 75 miles from Contractor’s place of business, indirect costs, such as general overhead (for example, home office overhead [including technology hardware and software] or insurance premiums), for which Contractor must pay out of its compensation for services under Section 3 above; nor do they include expenses incurred in connection with Services that result from Wrongful Acts or Omissions.

Payment shall be made within 30 days upon submission of periodic invoice(s) to the attention of James Dobson, Director, Planning & Construction, Sacramento City Unified School District, 425 1st Avenue, Sacramento, California 95818.

ARTICLE 4. EQUIPMENT AND FACILITIES.

District will provide Contractor with access to all needed records and materials during normal business hours upon reasonable notice. However, District shall not be responsible for nor will it be required to provide personnel to accomplish the duties and obligations of Contractor under this Agreement. Contractor will provide all other necessary equipment and facilities to render the services pursuant to this Agreement.

ARTICLE 5. WORKS FOR HIRE/COPYRIGHT/TRADEMARK/PATENT

The Contractor understands and agrees that all matters specifically produced under this Agreement that contain no intellectual property or other protected works owned by Contractor shall be works for hire and shall become the sole property of the District and cannot be used without the District’s express written permission. The District shall have the right, title and interest in said matters, including the right to secure and maintain the copyright, trademark and/or patent of said matter in the name of the District. The Contractor consents to the use of the Contractor’s name in conjunction with the sale, use, performance and distribution of the matters, for any purpose in any medium.

As to those matters specifically produced under this Agreement that are composed of intellectual property or other protected works, Contractor must clearly identify to the District those protected elements included in the completed work. The remainder of the intellectual property of such completed works shall be deemed the sole property of the District. The completed works that include both elements of Contractor’s protected works and the District’s protected works, shall be subject to a mutual non-exclusive license agreement that permits either party to utilize the completed work in a manner consistent with this Agreement including the sale, use, performance and distribution of the matters, for any purpose in any medium.
ARTICLE 6. INDEPENDENT CONTRACTOR.
Contractor's relationship to the District under this Agreement shall be one of an independent contractor. The Contractor and all of their employees shall not be employees or agents of the District and are not entitled to participate in any District pension plans, retirement, health and welfare programs, or any similar programs or benefits, as a result of this Agreement.

The Contractor and their employees or agents rendering services under this agreement shall not be employees of the District for federal or state tax purposes, or for any other purpose. The Contractor acknowledges and agrees that it is the sole responsibility of the Contractor to report as income its compensation from the District and to make the requisite tax filings and payments to the appropriate federal, state, and/or local tax authorities. No part of the Contractor's compensation shall be subject to withholding by the District for the payment of social security, unemployment, or disability insurance, or any other similar state or federal tax obligation.

The Contractor agrees to defend, indemnify and hold the District harmless from any and all claims, losses, liabilities, or damages arising from any contention by a third party that an employer-employee relationship exists by reason of this Agreement.

The District assumes no liability for workers' compensation or liability for loss, damage or injury to persons or property during or relating to the performance of services under this Agreement.

ARTICLE 7. FINGERPRINTING REQUIREMENTS.
Education Code Section 45125.1 states that if employees of any contractor providing school site administrative or similar services may have any contact with any pupils, those employees shall be fingerprinted by the Department of Justice (DOJ) before entering the school site to determine that they have not been convicted of a serious or violent felony. If the District determines that more than limited contact with students will occur during the performance of these services, Contractor will not perform services until all employees providing services have been fingerprinted by the DOJ and DOJ fingerprinting clearance certification has been provided to the District.

District has determined that services performed under this Agreement will result in limited contact with pupils. Contractor is required to comply with the conditions listed in Exhibit A, Contractor's Certification of Compliance. If the Contractor is unwilling to comply with these requirements, the Contractor's employees may not enter any school site until the Contractor provides the certification of fingerprinting clearance by the DOJ for employees providing services. These requirements apply to self-employed contractors.

ARTICLE 8. MUTUAL INDEMNIFICATION.
Each of the Parties shall defend, indemnify and hold harmless the other Party, its officers, agents and employees from any and all claims, liabilities and costs, for any damages, sickness, death, or injury to person(s) or property, including payment of reasonable attorney's fees, and including without limitation all consequential damages, from any cause whatsoever, arising directly or indirectly from or connected with the operations or services performed under this Agreement, caused in whole or in part by the negligent or intentional acts or omissions of the Parties or its agents, employees or subcontractors.

It is the intention of the Parties, where fault is determined to have been contributory, principles of comparative fault will be followed and each Party shall bear the proportionate cost of any
damage attributable to fault of that Party. It is further understood and agreed that such indemnification will survive the termination of this Agreement.

ARTICLE 9. INSURANCE.
Prior to commencement of services and during the life of this Agreement, Contractor shall provide the District with a copy of its policy evidencing its comprehensive general liability insurance coverage in a sum not less than $1,000,000 per occurrence. Contractor will also provide a written endorsement to such policy naming District as an additional insured, and such endorsement shall also state "Such insurance as is afforded by this policy shall be primary, and any insurance carried by District shall be excess and noncontributory." If insurance is not kept in force during the entire term of the Agreement, District may procure the necessary insurance and pay the premium therefore, and the premium shall be paid by the Contractor to the District.

ARTICLE 10. TERMINATION.
The District may terminate this Agreement without cause upon giving the Contractor thirty days written notice. Notice shall be deemed given when received by Contractor, or no later than three days after the day of mailing, whichever is sooner.

The District may terminate this Agreement with cause upon written notice of intention to terminate for cause. A Termination for Cause shall include: (a) material violation of this Agreement by the Contractor; (b) any act by the Contractor exposing the District to liability to others for personal injury or property damage; or (c) the Contractor confirms its insolvency or is adjudged a bankrupt; Contractor makes a general assignment for the benefit of creditors, or a receiver is appointed on account of the Contractor's insolvency.

Ten (10) calendar days after service of such notice, the condition or violation shall cease, or satisfactory arrangements for the correction thereof be made, or this Agreement shall cease and terminate. In the event of such termination, the District may secure the required services from another contractor. If the cost to the District exceeds the cost of providing the service pursuant to this Agreement, the excess cost shall be charged to and collected from the Contractor. The foregoing provisions are in addition to and not a limitation of any other rights or remedies available to the District. Written notice by the District shall be deemed given when received by the other party or no later than three days after the day of mailing, whichever is sooner.

ARTICLE 11. ASSIGNMENT.
This Agreement is for personal services to be performed by the Contractor. Neither this Agreement nor any duties or obligations to be performed under this Agreement shall be assigned without the prior written consent of the District, which shall not be unreasonably withheld. In the event of an assignment to which the District has consented, the assignee or his/her or its legal representative shall agree in writing with the District to personally assume, perform, and be bound by the covenants, obligations, and agreements contained in this Agreement.

ARTICLE 12. NOTICES.
Any notices, requests, demand or other communication required or permitted to be given under this Agreement shall be in writing and shall be deemed to have been duly given on the date of service if served personally on the party to whom notice is to be given, or on the third day after mailing if mailed to the party to whom notice is to be given, by first class mail, registered or certified, postage prepaid, or on the day after dispatching by Federal Express or another overnight delivery service, and properly addressed as follows:
ARTICLE 13. ENTIRE AGREEMENT.

This Agreement contains the entire agreement between the parties and supersedes all prior understanding between them with respect to the subject matter of this Agreement. There are no promises, terms, conditions or obligations, oral or written, between or among the parties relating to the subject matter of this Agreement that are not fully expressed in this Agreement. This Agreement may not be modified, changed, supplemented or terminated, nor may any obligations under this Agreement be waived, except by written instrument signed by the party to be otherwise expressly permitted in this Agreement.

ARTICLE 14. CONFLICT OF INTEREST.

The Contractor shall abide by and be subject to all applicable District policies, regulations, statutes or other laws regarding conflict of interest. Contractor shall not hire any officer or employee of the District to perform any service covered by this Agreement. If the work is to be performed in connection with a Federal contract or grant, Contractor shall not hire any employee of the United States government to perform any service covered by this Agreement.

Contractor affirms to the best of their knowledge, there exists no actual or potential conflict of interest between Contractor’s family, business or financial interest and the services provided under this Agreement. In the event of a change in either private interest or services under this Agreement, any question regarding possible conflict of interest which may arise as a result of such change will be brought to the District’s attention in writing.

ARTICLE 15. NONDISCRIMINATION.

It is the policy of the District that in connection with all services performed under contract, there will be no discrimination against any prospective or active employee engaged in the work because of race, color, ancestry, national origin, handicap, religious creed, sex, age or marital status. Contractor agrees to comply with applicable federal and California laws including, but not limited to, the California Fair Employment and Housing Act.

ARTICLE 16. ATTORNEY’S FEES.

In the event of any action or proceeding brought by one party against the other party under this Agreement, the prevailing party shall be entitled to recover its attorney’s fees and reasonable costs in such action or proceeding in such an amount as the court may judge reasonable.

ARTICLE 17. SEVERABILITY.

Should any term or provision of this Agreement be determined to be illegal or in conflict with any law of the State of California, the validity of the remaining portions or provisions shall not be affected thereby. Each term or provision of this Agreement shall be valid and be enforced as written to the full extent permitted by law.
ARTICLE 18. RULES AND REGULATIONS.

All rules and regulations of the District's Board of Education and all federal, state and local laws, ordinance and regulations are to be strictly observed by the Contractor pursuant to this Agreement. Any rule, regulation or law required to be contained in this Agreement shall be deemed to be incorporated herein.

ARTICLE 19. APPLICABLE LAW/VENUE.

This Agreement shall be governed by and construed in accordance with the laws of the State of California. If any action is instituted to enforce or interpret this Agreement, venue shall only be in the appropriate state or federal court having venue over matters arising in Sacramento County, California, provided that nothing in this Agreement shall constitute a waiver of immunity to suit by the District.

ARTICLE 20. RATIFICATION BY BOARD OF EDUCATION.

This Agreement is not enforceable and is invalid unless and until it is approved and/or ratified by the governing board of the Sacramento City Unified School District, as evidenced by a motion of said board duly passed and adopted.

Executed at Sacramento, California, on the day and year first above written.

SACRAMENTO CITY
UNIFIED SCHOOL DISTRICT

By: ____________________________
Patricia A. Hagemeyer
Chief Business Officer

NTD ARCHITECTURE

By: ____________________________
Signature
Print Name/Title

Date

Date
EXHIBIT A

CONTRACTOR CERTIFICATION of COMPLIANCE

Fingerprinting: Education Code section 45125.1 provides that any contractor providing school site administrative or similar services to a school district must certify that employees who may come into contact with pupils have not been convicted of a serious or violent felony as defined by law. Those employees must be fingerprinted and the Department of Justice (DOJ) must report to the Contractor if they have been convicted of such felonies. No person convicted may be assigned to work under the contract. Depending on the totality of circumstances including (1) the length of time the employees will be on school grounds, (2) whether pupils will be in proximity of the site where the employees will be working and (3) whether the contractors will be working alone or with others, the District may determine that the employees will have only limited contact with pupils and neither fingerprinting nor certification is required.

The District has determined that section 45125.1 is applicable to this Agreement, and that the employees assigned to work at a school site under this Agreement will have only limited contact with pupils, provided the following conditions are met at all times:

1. Employees shall not come into contact with pupils or work in the proximity of pupils at any time except under the direct supervision of school district employees.
2. Employees shall use only restroom facilities reserved for District employees and shall not use student restrooms at any time.
3. Contractor will inform all employees who perform work at any school or District site of these conditions and require its employees, as a condition of employment, to adhere to them.
4. Contractor will immediately report to District any apparent violation of these conditions.
5. Contractor shall assume responsibility for enforcement of these conditions at all times during the term of this Agreement.

If, for any reason, the Contractor cannot adhere to the conditions stated above, the Contractor shall immediately so inform the District and shall assign only employees who have been fingerprinted and cleared for employment by the Department of Justice. In that case, the Contractor shall provide to the District the names of all employees assigned to perform work under this Agreement. Compliance with these conditions, or with the fingerprinting requirements, is a condition of this Agreement, and the District reserves the right to suspend or terminate the Agreement at any time for noncompliance.

Authorized Signature of Contractor __________________________ Date ____________

Printed Name/Title ____________________________________________

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Sacramento City Unified School District
Sustainable Master Plan- An Integrated Approach to Education & Facilities

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  Step 2: Evaluate
  Step 3: Identify
  Step 4: Optimize
  Step 5: Create
Fee Proposal 12
Team Biographies 13
Appendix

What a society honors will be cultivated...
Aristotle
Teresa Cummings, PhD
Chief of Staff
Sacramento City Unified School District
425 First Avenue
Sacramento, California 95824

Dear Teresa,

We are very excited to submit to the District our strategy for the development of a Sustainable Facilities Master Plan. Since our qualification and inclusion in the District’s pool of architects NTD Architecture has been actively engaged in discovery and visioning of the District’s issues and needs to learn how we can best support your future efforts. We are excited with the strategic direction being pursued by District leadership and believe we have a wealth of talent and resources to accomplish your goals.

We see the Sustainable Facilities Master Plan as a strategic tool for alignment and support with the Sacramento City Unified School District vision and goals. Our time is now to:

- Rethink: how we view our facilities
- Innovate: how our facilities optimize teaching and learning
- Excel: at transforming the District’s assets to support 21st Century Skills

Given this opportunity we can assist the District in creating a new model of instructional reform designed to transform the Sacramento City Unified School District educational process.

Our process for support envisions:
- Integrated educational, architectural and capital program management strategies;
- Community transparency and collaboration in decision making;
- Enhanced student achievement opportunities;
- Reduced operational and general fund expenditures; and
- Sustainable resource management outcomes.

We understand that this is a preliminary proposal intended to begin a dialogue towards process and solutions. We are truly inspired by your passion and commitment and we welcome the opportunity to serve your needs. We have significant skills as well as a devoted passion to compliment your vision and goals. Please accept this proposal as the beginning of our collaboration on strategies for your future.

Sincerely,

[Signature]

Jordan Knighton, AIA
NTD Architecture
Partner
Sacramento City Unified School District
Sustainable Master Plan- An Integrated Approach to Education & Facilities

Introduction

The Strategic Plan 2010 - 2014 has been developed to define the goals and objectives for the District. These pillars for success have been based upon the necessity to; Rethink, Innovate & Excel education for Sacramento City Unified School District.

As we understand the linkage between Education and Architecture we need to view our facilities as capital asset's and strategic tools. To achieve this level of high performance a Sustainable Facilities Master Plan is envisioned.

Sustainable Strategy

A Sustainable Facilities Master Plan is based upon seeking balance between:

Social Equity:
Integrated Education Vision

Environmental Stewardship:
Sustainable Standards; Facility & Operational

Economic:
Facility Asset & Strategic Tool

Sustainable Facilities Master Plan
Outcomes:
• Align with Educational Vision
• Support & Enhance Student Achievement
• Economic Resource Management
• Operational Efficiencies
• Facility Standards
• Sustainable Initiatives
• Promote Community Collaboration
• Reduce General Fund Expenditures
• Organizational Alignment w/ Strategic Planning Effort

Sustainability Model

Formula for Success

High Performing Education +
High Performing Facilities +
Community Partnerships =
High Performing Students
Process Diagram

The NTD Team recommends that the work completed as part of the Priority School’s be used as the process and template for evaluating all schools in the District. The anticipated success of our outcomes are based upon the District’s commitment to supporting the education, facilities and community discussions. In addition, strong collaboration is required between the District’s administration, staff, faculty, parents, students and the community.

Our proposed approach is based upon our success for providing sustainable solutions to transforming education and facilities that will yield benefits well beyond the scope of our services. This approach has been proposed based upon the unique goals of your District and can be modified to meet new and/or changing requirements.

Sustainable Master Plan Process

- **Step 1. Vision:**
  Establish Educational Program & Goals

- **Step 2. Evaluate:**
  Audit Prior Planning & Existing Conditions

- **Step 3. Identify**
  Program Initiatives

- **Step 4. Optimize**
  Alternate Solutions & Prioritization

- **Step 5. Create:**
  Sustainable Master Plan
Sacramento City Unified School District
Sustainable Master Plan- An Integrated Approach to Education & Facilities

Step 1. Vision

Establish Educational Program & Goals


A. Education
Task 1. Identify Stakeholders & Leadership

Objectives:
• Capture the "Big Picture"
• Identify Leadership Committee members
• Review and validate detailed schedule for the entire project
• Interview Executive Cabinet members to attain understanding of what is: Educational Standards, Facility Maintenance and Operations, Community Engagement goals and expectations.

Assumptions:
• District to deliver strategic vision.
• NTD to interview selected stakeholders

Task 2. Conduct Educational Visioning Workshop

Objectives:
• Review and Distill the Strategic Plan
• Identify vision, goals and objectives of the Sustainable Facilities Master Plan
• Define the metrics for success
• Inspire and gain commitment

Assumptions:
• (1) four hour workshop
• Participation with Superintendent and key District Leadership
Sacramento City Unified School District
Sustainable Master Plan- An Integrated Approach to Education & Facilities

Task 3. Leadership Advisory Meeting #1

Objectives:
- To incorporate the results of the visioning activities, and to develop district-wide educational program guidelines
- Identify a level of Equity standards for creating facility parity at each site
- Identify community outreach plan

Assumptions:
- (1) two-hour workshop

Task 4. Stakeholder Workshops #1

Objectives:
- To review District visioning
- To define grade configuration goals

Assumptions:
- (4) Meetings; one per Grade level configurations; Elementary, Middle, High, Alternative Schools
- Minimum of two per day

B. Community
Task 1. Web-Based Community Survey

- Excluded from Process, align with Bond Campaign.

Step 2. Evaluate
Existing Conditions Assessment

Primary Goals: Build Consensus of Shared Vision through District Facility Standards, Facility Analysis and Research.

A. Education
Task 1. Stakeholder Workshops #2

Objectives:
- To review current educational trends
- To evaluate educational goals

Assumptions:
- (4) Meetings; one per Grade level configurations; Elementary, Middle, High, Alternative Schools
- Minimum of two per day back to back.

Task 2. Leadership Advisory Meeting #2

Objectives:
- To review the grade level educational trends and goals.

Assumptions:
- (1) two-hour workshop

Task 3. Demographic Analysis and Trends

Objectives:
- To review enrollment projections that can be used to determine balanced utilization
- To review the demographic patterns of the general county population developments and trends
- To verify the capacity of all schools at each level
- To review current student retention and determine facility changes that can be made to improve overall student success

Assumptions:
- District to provide demographics to the team for review and analysis.

B. Facilities
Task 1. Sustainable Assessments

Objective:
To analyze existing data and to provide a report that summarizes the physical condition of each facility for use in determining current and future uses of the facilities. The assessments are proposed to be performed at two levels:

Tier 1 Sustainable Assessments:
- Review and summarize projects approved or in plans for construction
- Review and summarize district facilities master plan
Sacramento City Unified School District
Sustainable Master Plan- An Integrated Approach to Education & Facilities

- Define DSA projects that are Closed without Certification
- Facilities review
  - Inventory and identify uses of each district facility
  - Access code, health safety, ADA conditions
  - Access equality of facilities within school district and to industry standards
  - Develop maintenance, repair and replacement items for each facility
  - Utilize High Performance Assessment criteria per CHPS/LEED for filter and documentation.

Tier 2 Detailed Sustainable Assessments:
- Deferred for Future Funding

Assumptions:
- Assessments to be performed at all Active/Open School Sites:
  - High Schools: Qty of 15
  - Middle Schools: Qty of 9
  - Elementary Schools: Qty of 64
- District to provide list of needs at all Administrative Sites; District Office, Transportation, Maintenance & Operation Facilities and Adult Education Sites. NTD to consolidate documents, no site assessments assumed.
- No additional assessment work to be performed at the Priority Schools.

G. Community
Task 1. Community Open House #1

- Excluded from Process, align with Bond Campaign.

Task 2. Leadership Advisory Meeting #3

Objectives:
- To review the results of the Community Open House
- To review status of Sustainable Assessments
Assumptions:
- 11 two hour workshops

Step 3. Identify

Educational Needs, Resources & Options

Primary Goals: Determine Educational Needs through Investigations of Community/District Trends, Clarification of Community/District Educational Vision, And Presentation of Facility/Program Opportunities.

A. Education
Task 1. Stakeholder Workshops #3

Objectives:
- Building academic capacity to provide a framework for developing facility recommendations based on a comprehensive educational vision
- To establish a vision that is based "beyond the 21st century" education trends
- Identify stakeholders to become change agents (Staff, Students, Parents, Community, Business)

Assumptions:
- 4 Meetings; one per Grade level configurations; Elementary, Middle, High, Alternative Schools
- Minimum of two per day
Task 2. Educational Specifications

Excluded from Process, Align with Future Funding

B. Facilities

Task 1. Cost Management Services

Objectives:

• To review Sustainable Assessments and define conceptual level cost estimates.
• To identify costs per project type and per CHPS/LEED categories

Task 2. Preliminary Funding Analysis

Objectives:

• To create a preliminary set of research based funding options to accomplish the goals and objectives of the FMP
• Immediate Needs:
  • Review and summarize available Bond proceeds
  • Review and identify district eligibility for State Funding
  • Review and summarize joint use agreements
  • Identify potential alternative; local, state and federal funding

Assumptions:

• District to provide available funding data for review

Task 3. Facility Guidelines and Standards

Excluded from Process, Align with Future Funding

Task 4. Leadership Advisory Meeting #4

Objectives:

• To review status of assessments, cost services and preliminary funding analysis.
• To define prioritization concepts

Assumptions:

• (1) two hour workshop

C. Community

Task 1. Community Open House #2

Excluded from Process, align with Bond Campaign.
Step 4. Optimize

Transformation Concepts & Community Engagement

Primary Goals: Develop Facilities Recommendations that Prioritize Needs and Take Into Account Funding and Other Limitations.

A. Education & Facilities
Task 1. Leadership Advisory Meeting #5

Objectives:
• To review outcomes of Open House
• To define final strategic prioritization concept
• To review status of Site Transformations
Assumptions:
• (1) four hour workshop

Task 2: Site Transformation Concepts

Excluded from Process, align with Bond Campaign.

Task 3. Develop Prioritization Plan

Objective:
• To deliver a successful SMP process, initiate a realistic implementation plan with goals and priorities
• Implementation plan strategies presented to the District for recommendations.

Task 4. Leadership Advisory Meeting #6

Objectives:
• To review and finalize the Prioritization Plan
Assumptions:
• (1) two hour workshop

Task 5. Finalize Prioritization Plan

Objectives:
• To finalize the Program Prioritization Plan and distribute for potential bond or other funding support.

B. Community
Task 1. Community Open House #3

Excluded from Process, align with Bond Campaign.

Task 2. Leadership Committee Workshop #7

Objectives:
• To review outcomes of Open House
• To finalize framework for the Sustainable Master Plan
Assumptions:
• (1) two hour workshop
Step 5. Create

A Sustainable Master Plan (SMP)

Primary Goals: Finalize the Sustainable Master Plan and attain approval.

A. Education & Facilities
Task 1. Develop Draft Sustainable Master Plan

Objectives:
• To distribute a draft copy of the Sustainable Master Plan for review and comment.
• To provide the Board with the information necessary to fully understand the master plan strategies with the opportunity for input.
• To gauge the response of the community and stakeholders to the SMP.

Assumptions:
• District to review and comment within two weeks.

Task 2. Leadership Advisory Meeting #3

Objectives:
• To attain all comments from Draft document.
• To establish the base line criteria in which the plan will be assessed and the time periods for the assessments. The evaluation plan will define the actions required to keep the effort sustainable and a “living document” for the District.

Assumptions:
• [11] two hour workshop

Task 3. Finalize Sustainable Master Plan

Objectives:
• To finalize the Sustainable Master Plan

B. Community
Task 1. Board of Education Workshops

Objectives:
• To attain approval on Sustainable Master Plan.
• To celebrate milestone.
### Fee Proposal

The following represents our Scope of Work and Fee Proposals for the requested services within the context of a full service Sustainable Master Plan based upon the following approaches:

<table>
<thead>
<tr>
<th>Step</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1 - Vision</td>
<td>$49,400</td>
</tr>
<tr>
<td>Step 2 - Audit</td>
<td>$812,575</td>
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<tr>
<td>Step 3 - Identify</td>
<td>$277,925</td>
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<tr>
<td>Step 4 - Optimize</td>
<td>$40,200</td>
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<tr>
<td>Step 5 - Document</td>
<td>$44,700</td>
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<tr>
<td>Lump Sum Fee</td>
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See the attached exhibit for additional information.

### Reimbursables

Per Owner's Expense and treated as a reimbursable cost.
# Sustainable Facilities Master Plan (SMP)

**SCUSD: Active School Sites**

**Fee Proposal:** January 16, 2012 (Revised January 25, 2012)

## STEP ONE - VISION

<table>
<thead>
<tr>
<th>A Education</th>
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<tbody>
<tr>
<td>1 Executive Planning; 1D Stakeholders</td>
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<td>District to provide Stakeholder Documentation</td>
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<tr>
<td>2 Superintendent &amp; Cabinet Workshop: Educational Visioning</td>
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<tr>
<td>3 Leadership Advisory Committee #1 (January)</td>
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<tr>
<td>4 Stakeholder Workshops #1: Vision &amp; Goals (Qy ½ of 4)</td>
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<table>
<thead>
<tr>
<th>B Community</th>
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<tbody>
<tr>
<td>1 Conduct Web Based Community Survey</td>
<td>Alternate</td>
<td>District to conduct Community Survey</td>
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**Total Step One: $49,400**

## STEP TWO - EVALUATE

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<tr>
<th>A Education</th>
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<tr>
<td>1 Stakeholder Workshops #2: Guiding Principals- Part 1 (Qy ½ of 4)</td>
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<td>2 Leadership Advisory Committee #2 (February)</td>
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<tr>
<th>B Facilities</th>
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<tbody>
<tr>
<td>1 Tier 1: Sustainable Assessments</td>
<td>See Attached Exhibit for District Sites</td>
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<tr>
<td>2 Leadership Advisory Committee #3 (March)</td>
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<tr>
<td>3 Conduct Water Audit &amp; Energy Star Assessments</td>
<td>Future- Fund from Bond</td>
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<table>
<thead>
<tr>
<th>C Community</th>
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<tbody>
<tr>
<td>1 Community Open House #1: Vision Confirmation (Qy of 3)</td>
<td>Alternate</td>
<td>Conduct through stakeholder involvement</td>
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**Total Step Two: $812,575**

## STEP THREE - IDENTIFY

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<td>1 Stakeholder Workshops #3: Guiding Principals- Part 2 (Qy ½ of 4)</td>
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<td>2 Develop CDE Education Specifications</td>
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<td>Conduct Educational Specifications following Bond.</td>
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<table>
<thead>
<tr>
<th>B Facilities</th>
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<tbody>
<tr>
<td>1 Cost Management Services</td>
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<tr>
<td>2 Preliminary Funding Analysis</td>
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<tr>
<td>3 Comprehensive Funding Analysis</td>
<td>Future</td>
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<thead>
<tr>
<th>C Community</th>
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<tbody>
<tr>
<td>1 Community Open House #2: Concept Prioritization (Qy of 3)</td>
<td>Alternate</td>
<td>Conduct through stakeholder involvement</td>
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**Total Step Three: $277,925**

## STEP FOUR - OPTIMIZE

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<tr>
<td>1 Leadership Advisory Committee #5 (May)</td>
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<tr>
<td>2 Site Transformation Concepts (25 School Sites)</td>
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<tr>
<td>3 Develop Prioritization Plan</td>
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<tr>
<td>4 Leadership Advisory Committee #6 (June)</td>
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<tr>
<td>5 Distribute Prioritization Plan for Bond: June 2012</td>
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<td>6 Leadership Advisory Committee #7 (July)</td>
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<tr>
<td>7 Develop Schedule &amp; Implementation Plan</td>
<td>Future</td>
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<tr>
<td>8 Project Phasing Plan</td>
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<tr>
<td>9 Develop Utility Bills</td>
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<tr>
<th>B Community</th>
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<tbody>
<tr>
<td>1 Community Open House #3: Program Report (Qy of 3)</td>
<td>Alternate</td>
<td>Conduct as part of Bond Counsel Outreach</td>
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**Total Step Four: $40,200**

## STEP FIVE - CREATE

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<th>A Education &amp; Facilities</th>
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<tr>
<td>1 Develop Draft Sustainable Master Plan for Review</td>
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<tr>
<td>2 Leadership Advisory Committee #8 (August)</td>
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<tr>
<td>3 Finalize Sustainable Master Plan Document (October 2012)</td>
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<tr>
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<tbody>
<tr>
<td>1 Board Presentation &amp; Approval (October 2012)</td>
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**Total Step Five: $44,700**

**REIMBURSABLE PRINTING EXPENSES:** $0 As needed by District

---

**Base Sustainable Facilities Master Plan (1/19/12)**

**Revised Sustainable Facilities Master Plan:** $1,224,800 Lump Sum Fee

See the written proposal for additional detail information, clarification and assumptions.
### Sustainable Facilities Master Plan (SMP)

#### School Site Assessments

<table>
<thead>
<tr>
<th>School / Site</th>
<th>Address</th>
<th>Zip</th>
<th>Type</th>
<th>Grade Level</th>
<th>Notes</th>
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<tbody>
<tr>
<td>16th &amp; N (V)</td>
<td>1639 N Street</td>
<td>95814</td>
<td>Admin</td>
<td>Admin</td>
<td>Meeting to define need, no site assessment required</td>
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<tr>
<td>Operations Support Services 1</td>
<td>425 1st Avenue</td>
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<td>Admin</td>
<td>Admin</td>
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<tr>
<td>Operations Support Services 2</td>
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<td>Admin</td>
<td>Admin</td>
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<tr>
<td>Purchasing/Warehouse</td>
<td>3051 Reddix Avenue</td>
<td>95820</td>
<td>Admin</td>
<td>Admin</td>
<td>Meeting to define need, no site assessment required</td>
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<tr>
<td>Serna Center</td>
<td>5735 47th Avenue</td>
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<td>Admin</td>
<td>Meeting to define need, no site assessment required</td>
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<tr>
<td>Transportation</td>
<td>3017 Redding Avenue</td>
<td>95820</td>
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<td>Admin</td>
<td>Meeting to define need, no site assessment required</td>
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<tr>
<td>A. Warren McCluskey</td>
<td>5241 I Street</td>
<td>95819</td>
<td>Adult</td>
<td>Adult</td>
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<tr>
<td>Charles A. Jones Skills Center</td>
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<td>Adult</td>
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<td>Fremont School for Adults</td>
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<td>95816</td>
<td>Adult</td>
<td>Adult</td>
<td>Meeting to define need, no site assessment required</td>
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<tr>
<td>Old Marshall (V)</td>
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<td>95816</td>
<td>Adult</td>
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<td>Edward Kelly School</td>
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<td>Child Dev</td>
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<td>Family Education Center</td>
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<td>Child Dev</td>
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<td>Edward Kemble</td>
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<tr>
<td>Cesar E. Chavez</td>
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<td>A.M. Winn</td>
<td>3351 Explorer Drive</td>
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<td>Abraham Lincoln</td>
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<td>Alice Birney</td>
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<td>Bear Flag (I)</td>
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<td>Bowling Green Charter (D)</td>
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<td>Collins P. Huntington</td>
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<td>Crocker / Riverside</td>
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<td>David Lubin</td>
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<tr>
<td>Earl Warren</td>
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<td>95820</td>
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<tr>
<td>Elder Creek</td>
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<tr>
<td>Ethel L. Baker</td>
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<tr>
<td>Ethel Phillips</td>
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<td>Father Keith B. Kenny</td>
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<td>Freeport</td>
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<td>Fruit Ridge</td>
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<td>Golden Empire</td>
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<td>H.W. Harkness</td>
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<td>Hubert H. Bancroft</td>
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<td>Isador Cohen</td>
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<td>Jeediah Smith</td>
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<td>John Cabrillo</td>
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<td>John H. Still ES</td>
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<td>John Morse</td>
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<td>John Muir (L)</td>
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<td>ES</td>
<td>K - 6</td>
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</tr>
</tbody>
</table>
Jordan Knighton, AIA, NCARB
Partner

NTD Architecture/Partner
Jordan will maintain executive oversight of all aspects of the project and will lead the planning process through a collaborative consensus building process with all constituents. Through his intimate knowledge in transformational academic master planning, Jordan will lead a community-based planning process toward an integrated architecture, environment and academic response. Twenty-five years of principal experience in the Central and Northern California region has enabled Jordan to successfully complete master planning for numerous major school districts and community college master plans.

He is a licensed architect in California, holds a BS in Architecture from the University of Southern California, and is NCARB certified. Jordan has an impressive list of awards from associations such as C.A.S.H., CEFPI, CCFC, CPRS and AIA including his CCFC Master Planning Award of Excellence for a $500 M, 5 Community, 3 County District diverse planning process.

Derek Labrecque, AIA, LEED AP
BD&C, Associate Principal

NTD Architecture/Project Manager
Derek is a LEED Accredited Professional with demonstrated experience in sustainable master planning, design and project management of educational projects. His approach to design and management of projects is in alignment with the sustainable criteria of both CHPS and LEED standards. These standards have led to innovative and cost effective design solutions for his new construction, modernized and transformed projects.

Frank Locker, Ed.D.

Education Planner
Honored as Planner of the Year by the Council of Educational Facility Planners International for his comprehensive planning approach, consensus building process, and state-of-the-art school design, Frank leads clients to position their schools for the long term future through visioning, master planning, educational program development, educational specifications and collaborative concept design. A former college educator, certified facilitator, and registered architect, Frank bases his approach on research in effective learning. Frank is a frequent speaker at international, national, and regional school planning conferences, conceived and co-teaches the Effective Education/Innovative Facilities course at Harvard University, and writes an occasional column for SchoolFacilities.com. He is an affiliate of the Partnership for 21st Century Schools.

Kelvin Lee, Ed.D.

Education Planner
Kelvin Lee has more than 35 years experience as an educator and administrator serving as the Superintendent for Dry Creek Joint Elementary School District for 29 years. As an administrator, he was involved in all aspects of planning and programming for this high growth district, which grew from 150 students to over 7300 students during his appointment. His accomplishments include:
- Planned, Financed and Constructed Capitol Schools Facilities Program
- Led Passage of Two Local Bonds
- Educational Specifications Development
- Implemented Enhanced Developer Fees
- Nominated for Planner of the Year for C.E.FPI.
Susan M. Goltsman, FASLA, Principal

Moore Iacofano Goltsman, Inc. (MIG)/Communications, Planning & Design

Susan is a founding principal of MIG, specializing in environmental design, planning, community outreach and education. Her projects range from schools and community parks to zoos and museums. She combines social science and design to create environments that respond to the organization, the variety of user groups, the functions of the facility and the site context. Susan serves on regulatory committees of the U.S. Architectural and Transportation Barriers Compliance Board (ATBCB) to develop ADA guidelines for recreation and outdoor environments.

Susan also served on a national committee to adopt the Uniform Federal Accessibility Standards to children's environments, and worked with PBS and the American Institute of Architects to conduct national teleconferences for designers on universal design.

Regina Bills-Dacong

NTD Architecture/Funding & Advocacy

Regina works closely with school districts to ensure that their projects comply with School Facility Program law, and attain the most funding available to them under each program. In addition she oversees federal and private grants opportunities as well as community outreach and advocacy. She attends all State Allocation Board and Implementation Committee meetings to stay abreast of the changes to current programs and development of new programs.

Prior to joining NTD, Regina worked as a Project Manager at the Office of Public School Construction (OPSC) for approximately 7 years. She worked with districts throughout California, ranging from one-school school districts in rural areas to her final assignment as Project Manager for the Los Angeles Unified School District. She was instrumental in the development of the Overcrowding Relief Grant Program and the Small High School Program. In her capacity as a Project Manager, she processed numerous applications for the School Facility Program, The Charter School Facility Program and the Emergency Repair program. She also participated in real estate reviews for site acquisition funding.

Consultant Assessment Teams:

Cost Estimators:
- Cumming Corporation

Landscape Architects:
- Moore Iacofano Goltsman, Inc. (MIG)/Communications, Planning & Design
- Yamasaki Landscape Architects

Mechanical Engineers:
- Capitol Engineering
- Peters Engineer

Electrical Engineers:
- The Engineering Enterprise
- Peters Engineer