

JOINT BOARD OF EDUCATION

AGENDA

Date of Meeting: August 29, 2023

Time: 5:00 PM

Location: Professional Development Center at the Kathryn W. Leonard
Administrative Office

- I. **Call to Order** Cindy Luttrell, Cal Doty
- II. **Roll Call** Jamie Galyon, Lora Young
- III. **Invocation** Cal Doty
- IV. **Pledge to the Flag** Cindy Luttrell
- V. **Public Comment Period** (20 Minutes) Cindy Luttrell, Cal Doty
- VI. **Approval of Minutes of the May 10, 2023 Joint Board Meeting** Steve Starnes, Todd Smith
- VII. **Presentation of Recommendation from Facilities Planning Sub-Committee** Steve Starnes, Todd Smith
- VIII. **Consideration of Entering into a Contract with Cooperative Strategies (Woolpert) to Provide Facilities Planning Services** Steve Starnes, Todd Smith
- IX. **Provide Update on Status of Purchase of Jeff Woods Memorial Property** Todd Smith
- X. **Closing Thoughts** BOE, City Council
- XI. **Adjournment** Cindy Luttrell, Cal Doty

Talking Points:

- Rubric & Results
 - Thorough and Systematic Process.
 - Experience & Client Base (Kingsport and Sullivan County – 2000+ School Districts Served).
 - Public engagement to gather input & build support.
 - Value & confidence in being involved from the beginning. (Build With vs. Communicating To).
 - Difference in Quote vs Proposal - Internal master plan vs. including community engagement.
 - Allow Cooperative Strategies to present and answer questions.
 - Feel like Cooperative Strategies (Woolpert) is the most qualified firm to conduct the project.
-
- Recommendation of the Sub-Committee = Option 1C + Student Potential Analysis + Facilities Planning = \$148,500

Grasp of the problems involved, soundness of approach, and the quality of the overall qualifications.	15
Specialized experience, technical competence, background, and previous experience of staff	15
Past record of performance with respect to the quality of work, approach, stakeholder engagement, work product and the ability to meet time schedules	15
Experience and proven performance with similar projects	15
Key team member qualifications and experience	10
Understanding of project intent	10
Completeness of response to RFQ	10
Timing/schedule	10

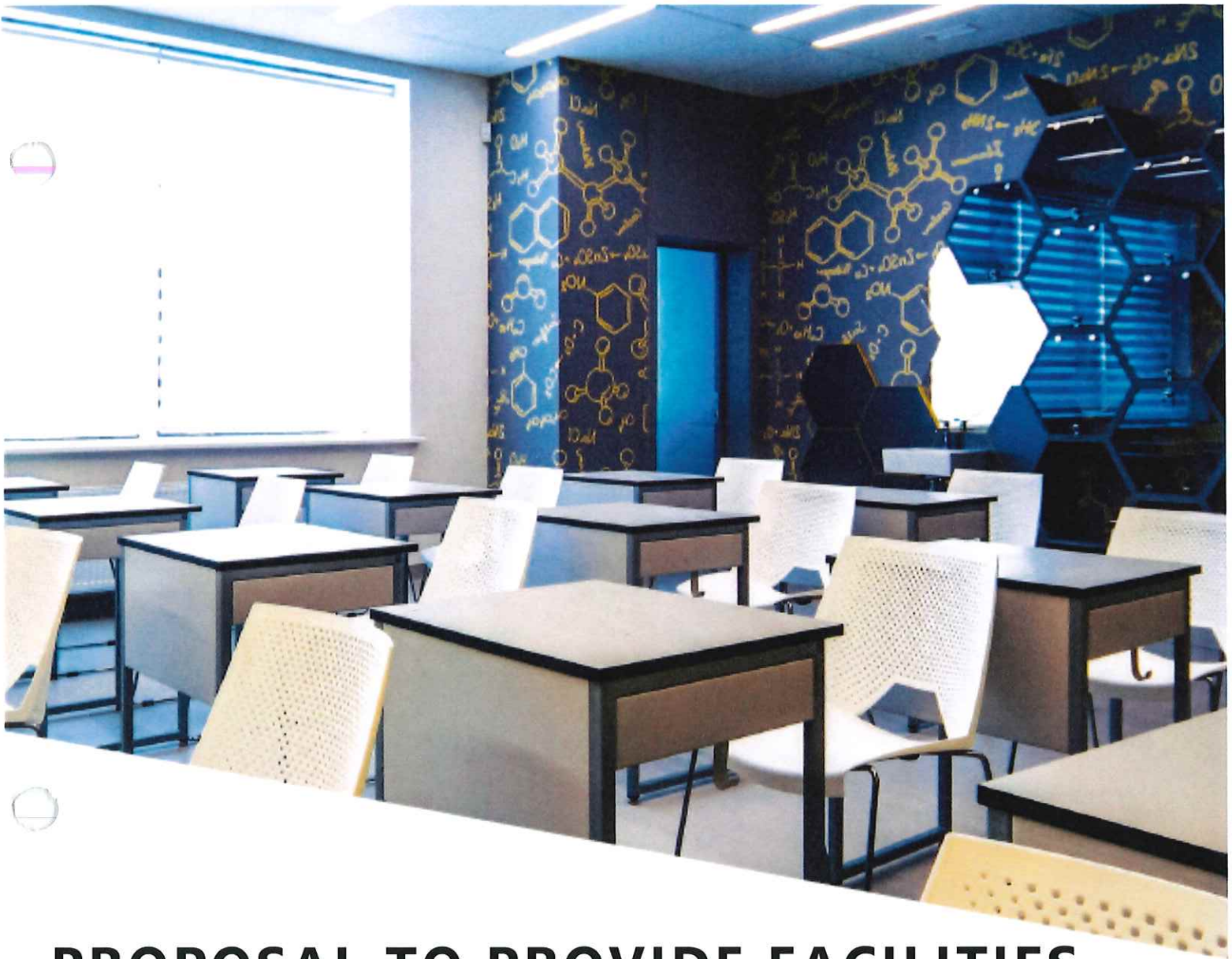
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Name	#1	#2	#3
Doty	Cooperative Strategies	Thompson & Litton	RSP & Associates
Kirk	Cooperative Strategies	Thompson & Litton	RSP & Associates
Miller	Cooperative Strategies	Thompson & Litton	RSP & Associates
Quillen	Cooperative Strategies	Thompson & Litton	RSP & Associates
Smith	Cooperative Strategies	Thompson & Litton	RSP & Associates
Starnes	Cooperative Strategies	Thompson & Litton	RSP & Associates

FEE PROPOSAL

Listed in the table below, Cooperative Strategies, LLC (“CS” or “We”) is providing a range of services and available options for Planning Services to Greeneville City School System (“GCS” or “School District”). These service descriptions are based on the Statements of Work previously listed in this proposal. The total fee amount will be dependent on the selected service options. This fee shall be payable in monthly installments based on the percentage of work completed.

SERVICE DESCRIPTION	PROPOSED FEE	ESTIMATE OF HOURS TO COMPLETE
Enrollment & Demographics		
Option 1A – Enrollment Projections by School of Attendance	\$9,000 (*plus reimbursable expenses)	50
Option 1B – Enrollment Projections by Boundary of Residence	\$12,000 (*plus reimbursable expenses)	82
Option 1C – Enrollment Projections by School of Attendance and Boundary of Residence	\$18,000 (*plus reimbursable expenses)	113
Student Potential Analysis	\$25,000 (*plus reimbursable expenses)	156
Facilities Planning Qualifications incorporates Fees & Hours for Educational Specifications, Financial, and Community Engagement		
Facilities Planning	\$105,500 (*plus reimbursable expenses)	526
OPTIONAL LANGUAGE: The total hours and fee amount will be dependent on the enrollment projections descriptions selected above	Range: \$139,500 to \$148,500 (Includes estimate of reimbursable expenses of \$16,000)	732 to 795 hours



PROPOSAL TO PROVIDE FACILITIES PLANNING SERVICES

GREENEVILLE CITY SCHOOL SYSTEM

COPY #1

JUNE 30, 2023



**COOPERATIVE
STRATEGIES**
ASSESS • PLAN • FUND • BUILD



OUR VISION

Our vision is to create exceptional educational experiences for all students.

OUR MISSION

Our mission is to help school districts evaluate facility and educational needs so they can create unified plans that maximize the educational experience and improve their facilities. Our multifaceted approach enables school districts to:

Assess the past by examining facility conditions, educational adequacy, and capacity

Plan for the future by creating master plans and studies that match community wants and needs with district priorities

Fund their vision by evaluating multiple project funding sources and implementation options

YOUR TEAM
EVERY STOP
ALONG THE WAY

THE CS BUS ROUTE 

THE CS BUS ROUTE

ASSESS

- Facility Condition Assessments
- Educational Adequacy Assessments
- Capacity Analyses

PLAN

- Master Plans
- Strategic Plans
- Enrollment & Demographic Studies
- Housing Studies
- Attendance Boundary Studies
- Redistricting Studies
- Voting Area Creation
- Other Studies
- Community Engagement

FUND

- Community Facilities Districts
- Funding Plans
- General Obligation Bonds
- Debt Refunding / Restructuring
- Special Tax Bonds



Navigating your educational and facilities planning journey is no easy task, but you don't have to do it alone. From initial **assessment** and **planning**, to project **funding** – we'll help you create a unified strategy to stay on track. And we'll be with you *every stop along the way.*

LETTER OF INTEREST

Mr. Todd Smith, City Manager

Town of Greeneville
200 N. College St.
Greeneville, TN 37745

June 30, 2023

Re: Proposal to Provide Facilities Planning Services

Dear Mr. Smith:

Cooperative Strategies, LLC is pleased to submit the enclosed proposal to provide Facilities Planning Services to meet future growth needs in the Greeneville City School System (GCS or "District").

Like many of our K12 clients across the county and across town, Greeneville is experiencing housing and population growth requiring the need to reassess current use of space, recalibrate enrollment projections, and make long-term plans to expand capacity. To meet the GCS's equity goals in the process, the plan must deliver an achievable roadmap to place every student in a comfortable, safe, educationally adequate, and highly resourced school that aligns with the District's mission, budget, and community values.

GCS needs a team experienced in and focused on portfolio-level school planning, demography, and community engagement. This is our core business, having performed more than 3,200 enrollment projections, 320 Facilities Master Plans, and 200,000,000 square feet of K12 condition assessments nationwide. This team brings in-depth financial, demographic, condition, and programmatic analyses to create an achievable facility plan aligned to District goals and community support. This team is not a school design firm that also pursues planning work: Creating a master plan through robust and strategic community engagement is sole focus.

On behalf of our entire team, we look forward to continuing to work alongside GCS to create an actionable, long-term plan for the Greeneville community. We look forward to the prospect of working with GCS!

Sincerely,



Ann Hoffsis, REFP, Chief Operating Officer
ahoffsis@coopstrategies.com
614-526-3067

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ABOUT US

OUR ABILITY TO SERVE YOU



WHO WE ARE

We are a tightknit team of educational facility and program planners with backgrounds in school facility management, educational program planning, 21st Century Learning principles, GIS, engineering, capital planning, and community engagement. Our team members include former state department of education thought leaders; former school superintendents, maintenance managers, teachers, and administrators; Association for Learning Environments members; Recognized Educational Facility Planners; and MSRB Series 50 Municipal Advisor Representatives.

We firmly believe that a thriving, equitable public education system is foundational to our democracy and our country's vitality.

WHY COOPERATIVE STRATEGIES?

We are dedicated to strengthening our public school institutions at every level, every day. Cooperative Strategies has worked alongside the [Re]Build America's School Infrastructure Coalition, the National Council on School Facilities, and the Center for Cities + Schools [toward the passage of legislation](#) to support the modernization of our nation's worst school facilities. We have facilitated regular webinars where K12 thought leaders collaborate on how to equitably and safely educate all students.

As your needs evolve, so do our offerings. From initial building and standards assessments, to facility and demographic planning, to financial advisory services, to full program management—we partner with school districts throughout their entire journeys.

For us, it's all about relationships. We know that one size does not fit all, especially when it comes to planning educational facilities. Our team works hard to understand each district's goals and objectives and to become a trusted extension of their staff. Many school districts have been clients for upwards of 20 years—our approach is about building lasting partnerships.

NATIONWIDE EXPERTISE

We guide school districts of all shapes and sizes through projects of all shapes and sizes. Our expertise across the facility and educational planning process means districts do not need to hire multiple firms from various industries.





Our team listens to administrations' hopes and communities' concerns. We partner with school boards to help build stakeholder consensus. And we work with developers and designers to execute schools' visions.



With thousands of success stories across the U.S. and beyond, we easily adapt to regional laws and regulations.

Our four offices spread across the country—in **California, Colorado, Ohio, and Texas**—enable us to offer nimble, cost-effective solutions to clients regardless of their location or time zone.

OUR ACCOMPLISHMENTS

<p>2,000+ School Districts Served</p>	<p>15+ Billion Dollars in Bonds</p>	<p>15+ Service Lines</p>	
<p>320+ Facilities Master Plans</p>		<p>250 Million Dollars in Owner's Rep.</p>	<p>200+ Million Sq. Ft. of Schools Assessed</p>
<p>3,200+ Enrollment Projections</p>	<p>27+ Years of Experience</p>		<p>Multiple Series 50 Qualified Municipal Advisors</p>
	<p>280+ Educational Specifications</p>	<p>SaaS Offerings Including My Facility Informer™</p>	<p>4 U.S. Office Locations</p>

SCOPE OF SERVICES

GEOGRAPHIC INFORMATION SYSTEM (GIS)

ENROLLMENT PROJECTIONS

HOUSING ANALYSES

FACILITIES MASTER PLANNING

GEOGRAPHIC INFORMATION SYSTEM (GIS)

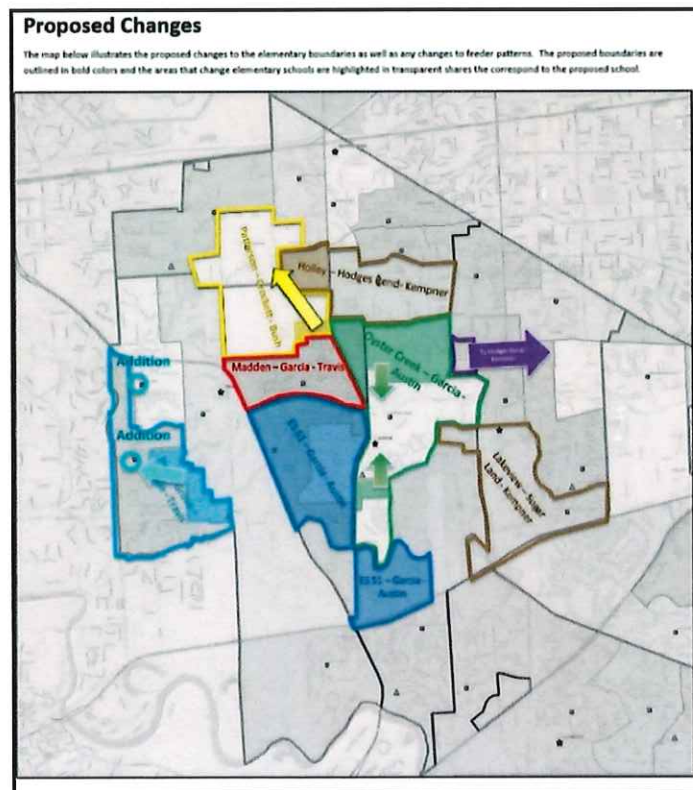
GIS's powerful ability to communicate complex spatial concepts puts it at the heart of nearly every planning process we provide school districts. Our core planning team members have extensive experience applying long-established GIS products as well as the ability to create products to adapt to any new situation.

If You Can Dream It, We Can Map It

Below are examples of traditional work GIS work products we provide.

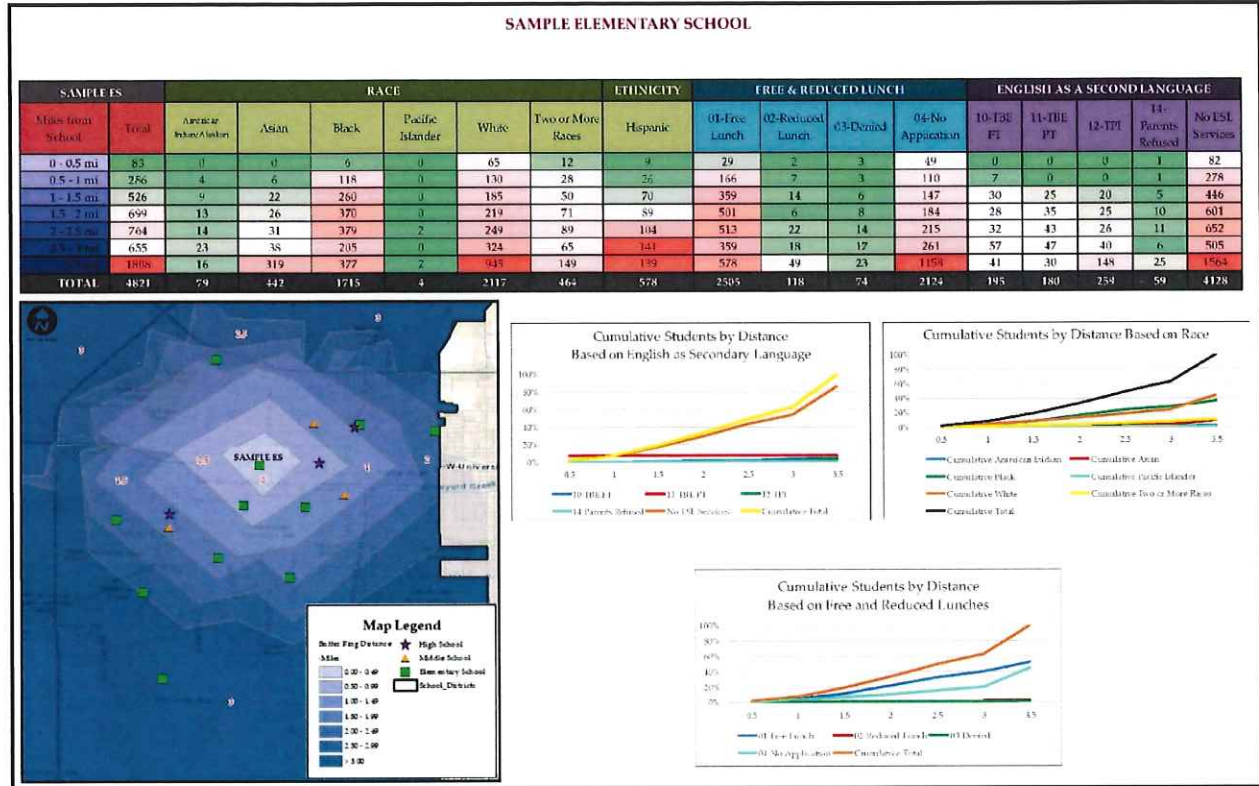
ATTENDANCE ZONE MAPPING

To help stakeholders understand the impacts of boundary changes, the graphic below illustrates areas that are moving and the associated impacts on data.



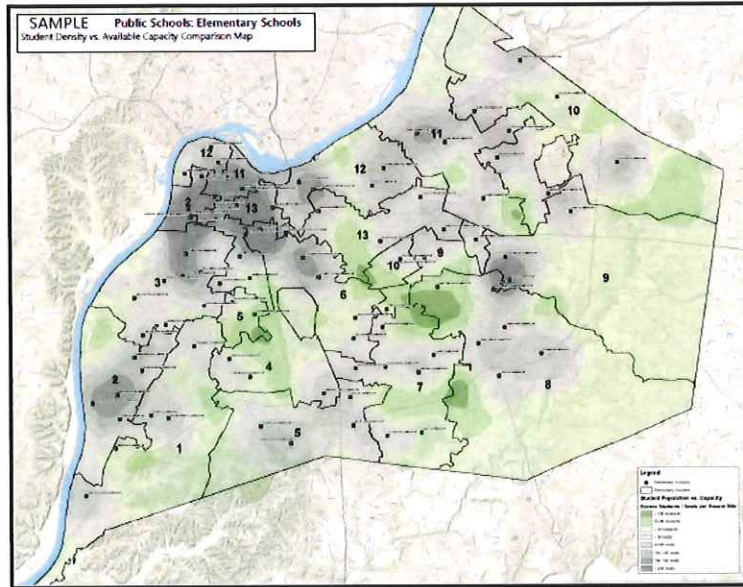
CUMULATIVE DISTANCE MAPPING

To help school districts understand student travel time, we can analyze student counts and attributes by incremental cumulative distances away from facilities.



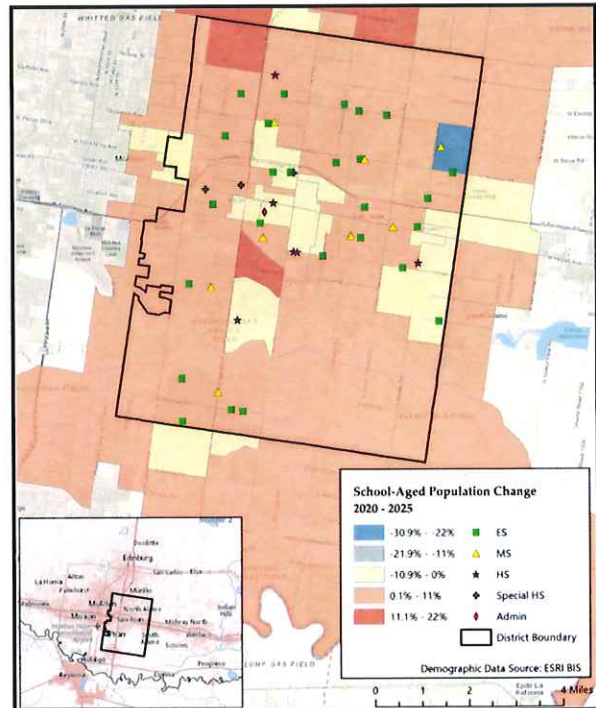
UTILIZATION MAPPING

Below is a multivariable utilization map that illustrates enrollment, capacity, and resulting utilization while identifying areas that have either too much or not enough capacity to serve students. This is very helpful in identifying school locations that are deficient for transportation.



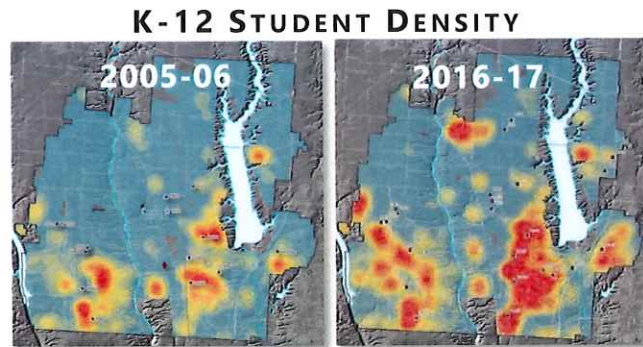
BLOCK GROUP MAPPING

Block group maps can display demographic population data as varied as age, income, race, employment by industry and occupation, educational attainment, and household income. The example below displays the school-aged population change by block group over a five-year period.



STUDENT DENSITY MAPPING

Populations move—buildings do not. One of the important analyses we perform is to layer changes in population and subpopulations through time to see how growth and decline are trending.



INTERNET ACCESS MAPPING FOR CABELL COUNTY SCHOOLS (CCS)

During the end of the 2019-20 school year as COVID-19 began posing major challenges, we used our GIS expertise to help CCS study the availability of internet access for its students.

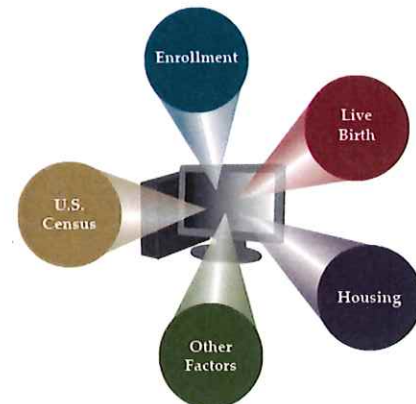
First, we analyzed District-provided survey data that told us, by household, whether a household had internet, whether it was adequate, or whether they did not have internet at all. We then translated this information onto a map to provide a visualization for the District. CCS used the map to identify areas where they could provide individual hotspots to families, as well as areas where there was a large enough concentration of need that they could look at a more broad-based solution.

This innovative GIS mapping helped CCS make data-driven decisions to improve student access to remote learning during the COVID-19 pandemic.

ENROLLMENT PROJECTIONS

Through our extensive experience with enrollment projections, we understand such work is as much an art as a science. The science is knowing which information to gather and how to use the forecasting methodologies. The art is in analyzing the output and knowing when and how to use the information.

We have created computer modeling mechanisms that take into account different demographic trends in different areas of school districts. These tools assist our clients in ensuring the provision of sufficient school facilities for their communities.



We use custom enrollment projection software, Student Trends & Enrollment Projections (S.T.E.P.), which we developed in collaboration with The Ohio State University. S.T.E.P. is based on industry best practices as well as our experiences with schools, school districts, and state agencies.



We analyze data using the S.T.E.P. software—which applies the cohort survival method—to develop recommended, moderate, low, and high enrollment projections. These projections take into account issues such as rate of growth or decline and recent economic developments.

Each of our enrollment projection studies include:

- Historical enrollment trends
- Ten years of enrollment projections by grade, by year
- Demographic profile of the School District including:
 - U.S. Census data
 - Census block group school-age population estimates (current and future)
 - Resident live birth counts
 - Housing information

We offer multiple approaches to projecting enrollment to meet the needs of our clients.

A **District-wide Enrollment Projection** is useful for budgeting and planning at the **district-wide** level. This service includes ten years of enrollment projections:

- District-wide, by grade, by year

An **Enrollment Projection by School of Attendance** is useful for facilities and boundary planning, planning teacher or program placement, and budgeting based on projected growth and decline in each school within the School District. We base these projections on **where students attend schools** within the School District. These projections reflect the actual student

enrollment in school facilities, regardless of which boundaries the students actually reside within. They account for inter-district and intra-district open enrollment and transfers. This service includes ten years of enrollment projections:

- By school, by grade, by year
- District-wide, by grade, by year

An **Enrollment Projection by Boundary of Residence** is useful for planning school facilities and attendance boundaries based on projected growth and decline in geographic areas within the School District. We base these projections on **where students live** within the School District's boundaries. These projections do not account for open enrollment or transfers, so they will reflect actual totals each facility can expect if all students attend the school assigned to their address. This service includes:

- By attendance boundary (geographic) area, by grade, by year for ten years
- District-wide, by grade, by year for ten years
- Live / Attend Analysis showing aggregate counts of where students live in respect to attendance area versus where students attend school
- Student Density Maps illustrating the concentration of students geographically throughout the School District

Our enrollment projection methodologies and tools have given us a history of providing extremely accurate projections for our clients. Many of our studies have yielded 99% or higher accuracy rates when comparing projected to actual enrollment.

STATEMENT OF WORK ENROLLMENT PROJECTIONS BY SCHOOL OF ATTENDANCE

Cooperative Strategies, LLC (CS or “We”) will provide Greeneville City School System (GCS or “School District”) with Enrollment Projections based on where students *attend* school. This option is useful for facilities and boundary planning, planning teacher or program placement, and budgeting based on projected growth and decline in each school within GCS. This service includes projections:

- By school, by grade
- District-wide, by grade

We base these projections on where students *attend schools* within the School District. These projections reflect the actual student enrollment in school facilities, regardless of which boundaries the students actually reside within. They account for inter-district and intra-district open enrollment and transfers. The table below details the specific activities and tasks we will perform under this Statement of Work.

ACTIVITY	TASKS
<p>1. Kick-off Meeting</p>	<p>1.A. Kick-off Meeting</p> <p>CS will facilitate a Kick-Off Meeting to review process, timeline, and data requests. We will use this meeting with administration to discuss any issues that have impacted enrollment in the past and / or may impact enrollment in the near future.</p>
<p>2. Collect and Review Data</p>	<p>2.A. Review District Data, Information, and Documents</p> <p>CS will collect and review GCS data, information, and documents related to existing and future student enrollment. The data, information, and documents may include:</p> <ul style="list-style-type: none"> • Student enrollment by school, by grade for 10 prior school years • Historical feeder patterns and school assignment policies • Open enrollment (transfer in/out) data, as available • Charter, non-public, and homeschool enrollment, as available • Resident live birth data from the state health department • U.S. Census data • Population trends • ESRI block group data • Housing Data • Planned residential development, as available

ACTIVITY	TASKS
	<ul style="list-style-type: none"> • Previous enrollment studies completed, as available
<p>3. Identify Trends</p>	<p>3.A. Calculate Cohort Survival Ratios</p> <p>CS will measure the change in the cohort--the number of pupils in one grade in one year--as this group progresses to higher grades in subsequent years. Because they take into account the changes occurring on a grade-by-grade basis, historical cohort survival ratios provide much more information than a simple enrollment history of the School District.</p> <p>We will analyze recent data and determine a projection ratio based on analysis of average or weighted ratios. This will reflect current enrollment trends within GCS and increase the accuracy of the final projections.</p> <p>3.B. Identify Kindergarten Enrollment Trends</p> <p>CS will analyze the correlation between historical kindergarten enrollments and the resident live birth counts within the community 5 years earlier. Live birth data is used to project future kindergarten enrollments.</p>
<p>4. Project Enrollment</p>	<p>4.A. Develop Enrollment Projections</p> <p>CS will use S.T.E.P. software to develop recommended, moderate, low, and high enrollment projections for the School District by school. We will develop enrollment projections using the cohort-survival method. These projections account for issues such as recent growth and economic trends.</p>
<p>5. Create Enrollment Projections Report</p>	<p>5.A. Prepare and Review Draft Report and Create Final Report</p> <p>CS will use and assess the information listed above to develop an Enrollment Projections Report that includes:</p> <ul style="list-style-type: none"> • Historical enrollment trend and grade-to-grade survival ratios • Demographic profile of the School District including: <ul style="list-style-type: none"> ○ U.S. Census data ○ Census block group school-age population estimates (current and future) ○ Resident live birth counts ○ Housing information • 10-year enrollment projections by school, by grade • 10-year enrollment projections district-wide, by grade

ACTIVITY	TASKS
	We will create a draft report and review and discuss it with GCS. We will provide a finalized report upon completion of the study.

STATEMENT OF WORK ENROLLMENT PROJECTIONS BY BOUNDARY OF RESIDENCE

Cooperative Strategies, LLC (CS or “We”) will provide Greeneville City School System (GCS or “School District”) with Enrollment Projections based on where students *live*. This option is useful for planning school facilities and attendance boundaries based on projected growth and decline in *areas* within the School District. This service includes projections:

- By attendance boundary area, by grade
- District-wide, by grade

We base these projections on where students *live* within the School District’s boundaries. These projections do not account for open enrollment or transfers, so they will reflect actual totals each facility can expect if all students attend the school assigned to their address. The table below details the specific activities and tasks we will perform under this Statement of Work.

*** Our proposed enrollment projections and their associated fee are dependent upon receipt of this information from the School District.*

****Our proposed enrollment projections and their associated fee are dependent upon receipt of this information from the School District. Should GCS have student data but no boundary data, we can help create a boundary shapefile for an additional fee.*

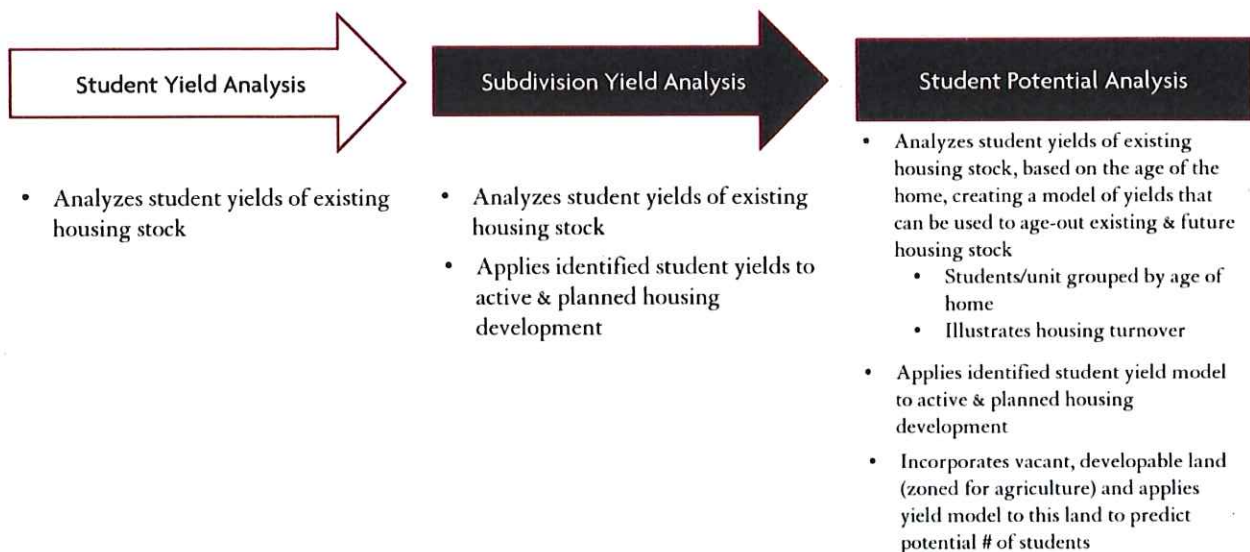
ACTIVITY	TASKS
<p>1. Kick-Off Meeting</p>	<p>1.A. Kick-Off Meeting</p> <p>CS will facilitate a Kick-Off Meeting to review process, timeline, and data requests. We will use this meeting with administration to discuss any issues that have impacted enrollment in the past and/or may impact enrollment in the near future.</p>
<p>2. Collect and Review Data</p>	<p>2.A. Review District Data, Information, and Documents</p> <p>CS will collect and review GCS data, information, and documents related to existing and future student enrollment. The data, information, and documents may include:</p> <ul style="list-style-type: none"> • District-wide student enrollment by grade, by year, for 10 prior school years • Last 10 years of student databases including student ID, address, school, and grade-level data (identifying information such as student name should be eliminated from the database before being submitted to us)** • Open enrollment (transfer in/out) data, as available

ACTIVITY	TASKS
	<ul style="list-style-type: none"> • Charter school and non-public school enrollment, as available • Attendance boundary shapefiles*** • Resident live birth data from state health department • Housing data • Planned residential development, as available • Population trends • Census data • ESRI block group data • Previous enrollment studies completed, as available <p>2.B. Geocoding</p> <p>Geocoding involves using the student database to place each student electronically on a map. CS will perform this process to address-match all students in GCS so enrollment can be analyzed in our Geographic Information System (GIS). Documentation will include the geocoded student file, address-matching specifications, accuracies, and other reference data used to create the file. During geocoding, we will:</p> <ul style="list-style-type: none"> • Organize GIS data in the coordinate system of local data sources • Perform quality control on student address data • Address-match each student record using ArcGIS software • Include GIS metadata where appropriate
<p>3. Identify Trends</p>	<p>3.A. Perform Live/Attend Analysis</p> <p>CS will perform a historical live/attend analysis showing aggregate counts of where students live in respect to attendance area versus where students attend school.</p> <p>3.B. Student Density Maps</p> <p>To illustrate the concentration of students throughout GCS, CS will create student density maps using available student data. These maps provide essential information about the distribution of the School District's student population.</p> <p>3.C. Calculate Cohort Survival Ratios</p> <p>CS will measure the change in the cohort--the number of pupils in one grade in one year--as this group progresses to higher grades in subsequent years. Because they consider the changes occurring on a grade-by-grade basis, historical cohort survival ratios provide much</p>

ACTIVITY	TASKS
	<p>more information than a simple enrollment history of the School District.</p> <p>We will analyze recent data and determine a projection ratio based on analysis of average or weighted ratios. This will reflect current enrollment trends within GCS and increase the accuracy of the final projections.</p> <p>3.D. Identify Kindergarten Enrollment Trends</p> <p>CS will analyze the correlation between historical kindergarten enrollments and the live birth counts within the community 5 years earlier. Live birth data is used to project future kindergarten enrollments.</p>
<p>4.</p> <p>Project Enrollment</p>	<p>4.A. Develop Enrollment Projections</p> <p>CS will use S.T.E.P. software to develop recommended, moderate, low, and high enrollment projections for the School District by attendance boundary. We will develop enrollment projections using the cohort-survival method. These projections account for issues such as recent growth and economic trends.</p>
<p>5.</p> <p>Create Enrollment Projections Report</p>	<p>5.A. Prepare and Review Draft Report and Create Final Report</p> <p>CS will use and assess the information listed above to develop an Enrollment Projections Report that includes:</p> <ul style="list-style-type: none"> • Historical enrollment trend and grade-to-grade survival ratios • Demographic profile of the School District including: <ul style="list-style-type: none"> ○ U.S. Census data ○ Census block group school-age population estimates (current and future) ○ Resident live birth counts ○ Housing information • 10-year enrollment projections by attendance boundary area, by grade • 10-year enrollment projections district-wide, by grade <p>We will create a draft report and review and discuss it with GCS. We will provide a finalized report upon completion of the study.</p>

HOUSING ANALYSES

Housing Analyses, when performed in conjunction with an enrollment projection, are helpful for planning new facilities, considering boundary changes, and determining the impact any housing development may have on enrollment. We offer multiple housing studies, each providing a different depth of data analysis.



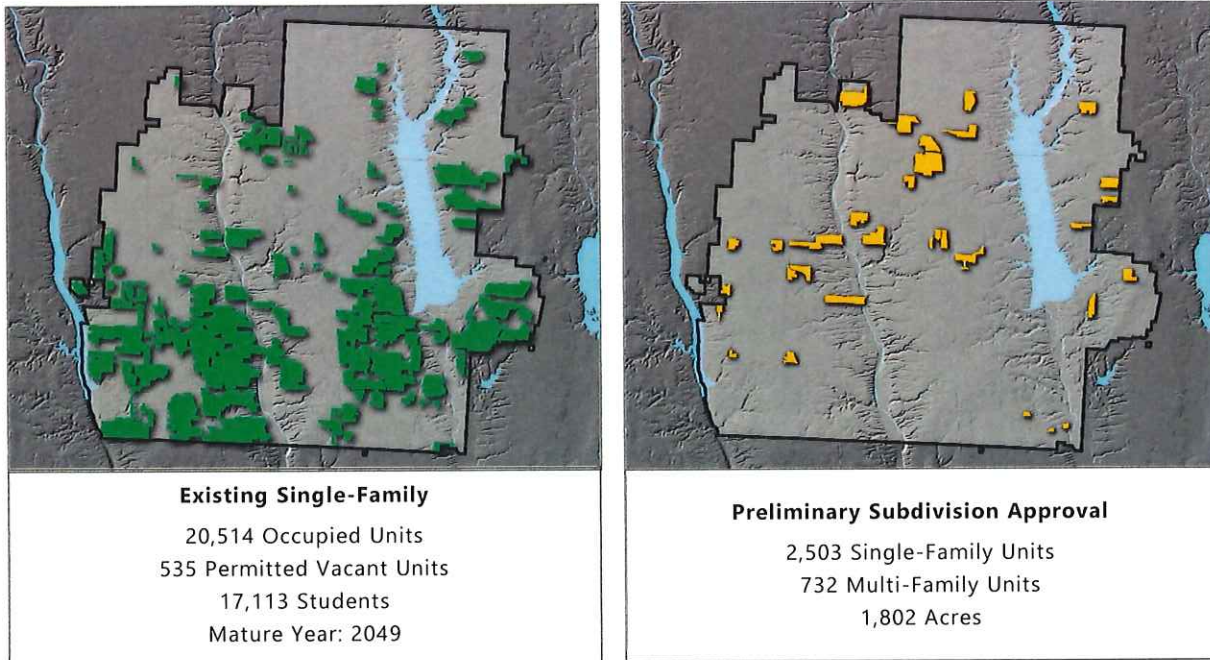
A **Student Yield Analysis** calculates district-wide student yields by housing type (single-family unit vs. multi-family unit) by dividing the number of students by the number of housing units. For example, 5 students / 10 homes = a student yield of 0.5 students per home.



This helps determine the number of students per single-family home and the number of students per multi-family unit and can be useful for districts that are experiencing some—but not extensive—development.

A **Subdivision Yield Analysis** studies and calculates student yield by housing type, by neighborhood, or subdivision. We apply the previously calculated student yields to any active and planned housing development in the district, providing data-driven estimates on how many students each new development could potentially yield upon completion. By comparing housing types, locations, and volume to where students live, we can establish yield factors for all geographies of a school district.

A **Student Potential Analysis** builds upon the Student Yield Analysis and Subdivision Yield Analysis to incorporate the potential number of students that may come out of vacant, developable land, as well as an analysis of student yields based on age of home. We calculate historical student yield by the following factors, based on data availability: housing type; age of home; and home value.



We use these yield factors to create a sliding scale of yields to account for housing turnover. The sliding scale is then applied to every existing home in the district based on its age, along with any identified housing development, land owned by developers, and vacant land that is likely to develop in the future. This provides a district-wide estimate of students based on historical and anticipated rates of housing development approximately 10-100 years into the future.

Creating a Study That Works for You

We understand that each school district is unique and that your situation may not fit into any of the analyses above. **We will take the time to fully understand your needs and can then tailor a report that fits your situation.** By combining our demographic expertise and GIS, we can analyze anything from sewer infrastructure to a municipality's comprehensive plans. We will work with GCS to help get the answers you need.

STATEMENT OF WORK STUDENT POTENTIAL ANALYSIS

Cooperative Strategies, LLC (CS or “We”) will provide Student Potential Analysis services to Greeneville City School System (GCS or “School District”). This process produces a district-wide estimate of students based on historical and anticipated rates of housing development, including vacant developable land, approximately 10-100 years into the future. The table below details the specific activities and tasks we will perform under this Statement of Work.

***Our proposed student potential analysis and its associated fee are dependent upon receipt of this information from the School District.*

ACTIVITY	TASKS
<p>1. Kick-off Meeting</p>	<p>1.A. Kick-off Meeting</p> <p>CS will hold a Kick-Off Meeting to review process, timeline, and data requests. We will use this meeting with administration to discuss any issues that have impacted enrollment in the past and / or may impact enrollment in the near future.</p>
<p>2. Collect and Review Data</p>	<p>2.A. Review Data, Information, and Documents</p> <p>CS will collect and review the information required to perform the demographic consulting services by reaching out to sources such as:</p> <ul style="list-style-type: none"> • School District • County Auditors • City Planning Departments • Regional Planning Commissions • Other relevant village, city, township, county, state, or federal agencies <p>Information collected can include such things as:</p> <ul style="list-style-type: none"> • Current student database including student ID, lunch program code, special education data, address, and school and grade level data (any identification information such as student name should be eliminated from the database before being submitted to Cooperative Strategies)** • Planned and/or approved residential developments within the School District • Parcel, address point, zoning, and current and future land use data from counties that feed into the School District • Comprehensive Plans

ACTIVITY	TASKS
	<p>We will make sure to use the most current data available.</p> <p>2.B. Geocoding</p> <p>Geocoding involves using the student database to place each student electronically on a map. CS will perform this process to address-match all students in the School District so enrollment can be analyzed in our Geographic Information System (GIS). Documentation will include the geocoded student file, address-matching specifications, accuracies, and other reference data used to create the file. During geocoding, we will:</p> <ul style="list-style-type: none"> • Organize GIS data in the coordinate system of local data sources • Perform quality control on student address data • Address-match each student record using ArcGIS software • Include GIS metadata where appropriate <p>We will map school facilities and other relevant data and include them in the GIS database. Map layers will be linked to any available data relevant to the District. In the process, the following will be completed:</p> <ul style="list-style-type: none"> • Address-match school locations • Digitize GCS boundaries • Identify other relevant School District data
<p>3.</p> <p>Analyze Data</p>	<p>3.A. Create Existing Subdivision Analysis</p> <p>CS will coordinate with GCS to create an existing subdivision data set to analyze the following:</p> <p>Housing:</p> <ul style="list-style-type: none"> • Housing type: single family, detached condominiums, attached condominiums, apartments • Number of housing units • Home value data • Home square footage data (if available) • Numbers of bedroom, bathroom, etc. (if available) • Year built data <p>Student Data:</p> <ul style="list-style-type: none"> • Counts of students by grade • Student yields (number of students per housing unit)

ACTIVITY	TASKS
	<ul style="list-style-type: none"> • Student grade-level distribution <p>3.B. Analyze Future Land Use</p> <p>CS will analyze all future developable land, using municipal planning data (zoning and land use) to categorize every developable parcel in the School District greater than five acres. The categories are created to develop a timeline of potential development and include the following:</p> <ul style="list-style-type: none"> • <u>Approved Developments</u> – projects that have been approved and all infrastructure is in place. These areas will likely be occupied within 1-3 years. • <u>Proposed Developments</u> – projects that are in the planning process and may have all necessary zoning changes approved, but the infrastructure may not yet be in place. These areas are likely to develop in 2-5 years. • <u>Developer-Owned Land</u> – typically, developers already own large tracts of agricultural land but have not completed the rezoning process yet to increase the density of homes that may be developed. Depending on market forces, this category is likely to develop in 4-10 years. • <u>Vacant Agricultural Land</u> – property that is still owned by agricultural interests and is typically located outside of infrastructure footprints. These areas may develop in 10-15 years. <p>In cases of developer-owned and agricultural land that still has agricultural zoning densities, we will build a model assuming that the areas will be rezoned to typical residential densities.</p>
<p>4. Develop and Apply Student Yield Modeling</p>	<p>4.A. Develop Student Yield Sliding Scale***</p> <p>This task goes beyond a typical build-out study, which would just apply a student-yield factor to all developable land. An inherent issue with that model is that it does not account for any decline or turnover in enrollment of existing housing stock. Planning with this type of analysis long-term may result in a school district over-building their facilities.</p> <p>Analysis of data from across the country has revealed a trend of declining student enrollment from established subdivisions over time (they typically have increasing student yields for the first 10-15 years, then begin to gradually decline). Some individual subdivisions may be</p>

ACTIVITY	TASKS
	<p>impacted by this trend more than others, but there is data to support the overall concept.</p> <p>CS will analyze the subdivision data developed to determine a sliding scale of student yields based on subdivision age. We will plot all existing subdivisions on this sliding scale, as some of them may already be on the low-yield end based on age and are not anticipated to decline further.</p> <p>***Student Yield Sliding Scale development is dependent upon the availability of year-built data. If year-built data is not available, we will discuss an alternative analysis (based on data availability) with the School District.</p> <p>4.B. Create Growth Scenarios for Future Developable Land</p> <p>CS will analyze historical development trends based on the number of homes built by year to create high, moderate, and low-growth scenarios for future developable land. We will also apply the student yield sliding scale discussed in the previous task to the future developable land analyzed, in the order of likely development.</p> <p>Based on the high, moderate, and low building trend models, we will show when each category of developable land will be exhausted and how many students are anticipated to come from those areas.</p> <p>The complete model will identify peak enrollment numbers and years based on high, moderate, and low building rates along with the year and potential enrollment once all development has been completed and all developments have aged-through the sliding scale. Depending on building pace and how much developable land is remaining, this may be 50-75 years away.</p>
<p>5. Create and Present Report</p>	<p>5.A. Create Comprehensive Report</p> <p>CS will use the data created and analyzed in the above tasks to create a draft comprehensive Student Potential Analysis report to review and discuss with the School District. We will provide a finalized report upon completion of the study. All data used in this process will be provided to GCS in Adobe PDF, Microsoft Excel, or Shapefile format.</p>

FACILITIES MASTER PLANNING

A facilities master plan (FMP) is a roadmap for achieving long-term goals that positively impact the quality of education in a school district; it is a strategic approach to building a better vision and future for the community. We specialize in large-scale, committee-led PK-12 facilities master planning projects that:

- Engage stakeholders across the community
- Analyze and synthesize multiple, varied sources of data
- Provide goals and strategies to address equity in facilities
- Produce prioritized, phased long-range facility modernization roadmaps

We help school districts envision the future of educational programming as a basis for determining which buildings to keep, modernize, replace, reconfigure, or re-purpose, and in what order projects should be accomplished. A facilities master planning process at its best considers many strategies that do not directly deal with facilities but have an impact on your facility priorities, such as educational program alignment, demographics, unique program offerings, historical and political legacies, etc. We work with school districts to create a plan that meets their programmatic goals and fits within their budget. Our first community engagement meeting we entitle a “Futures Conference” to discuss and receive feedback regarding the Educational Framework around which facilities options are developed later in the FMP process. The Futures Conference includes a presentation and discussion around such topics as:

- Alignment of the District’s strategic planning goals with facilities plans
- Local and national trends in education affecting facility usage with an eye to provide recommendations to support the space requirements of future academic programs
- Trends in the local and regional labor market that will affect future academic programs for middle and high school students with an eye to provide recommendations to accommodate the space requirements for future academic programs
- Sharing background data such as the capacity, enrollment, and utilization of each facility
- The educational adequacy of each facility and its ability to meet current and future programmatic space requirements

A FOCUS ON EDUCATIONAL GOALS

The planning process begins with educational goals that naturally influence and drive facilities programs, unlike the all-too-common practice of beginning with facilities planning and leaving educational programming as an afterthought.

PHASE 1: ANALYZING BACKGROUND INFORMATION AND INITIATING ENGAGEMENT

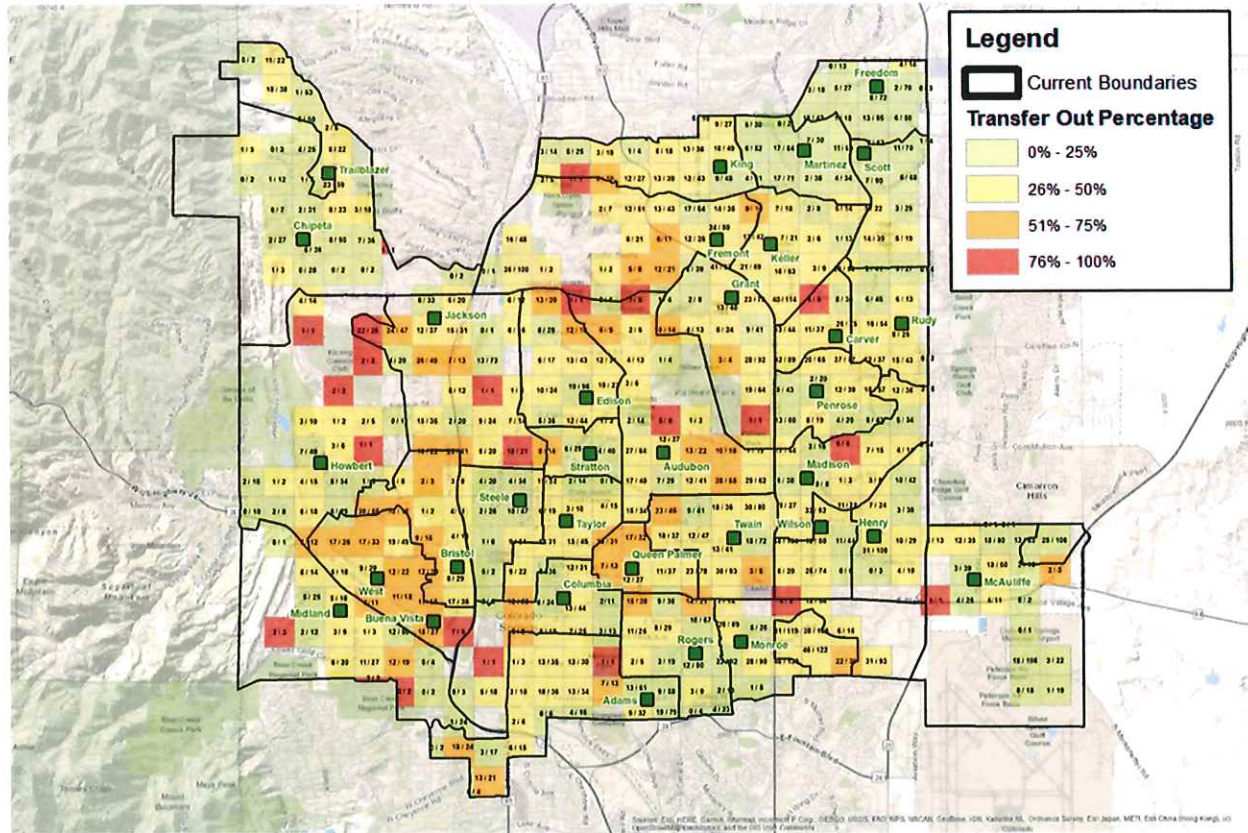
A successful facilities master plan incorporates four critical components: demographics, educational vision, facility condition, and financial data. Integrating these components will enable us to look at your needs from all angles to help ensure projects are outlined appropriately and will receive support from administrators and the community.

Effective community engagement begins with stakeholders sharing a common set of facts, finding common ground on a set of values, and sharing a common language when engaging with those facts and values. The foundation of a successful FMP and community engagement process begins, therefore, with the District Background Report.

BACKGROUND REPORT

Our team analyzes existing datasets, including: previous FMP updates, District's strategies plan, current academic programs and achievement, historical enrollment and current enrollment projections, capacity and utilization, facility condition and educational adequacy, sustainability plans, and notes and surveys from District staff and leadership to create the **Background Report**.

We will meet with school district staff to ensure our team's understanding of all relevant data and the processes used to analyze them. We will combine this data into a Background Report that serves as a starting point for the planning process and the common data set to ground the work of the Committee. We will collate and communicate the data to ensure that all community stakeholders clearly understand the comprehensive needs at all facilities, how they interact, and the decision-points for future action.



STAKEHOLDER ENGAGEMENT

We facilitate intentional **community engagement** at every step of the project. Our process includes both quantitative information, such as enrollment figures and use of GIS; and qualitative information, such as community input and stakeholder opinions. The goal is to receive valuable feedback from stakeholders and the community and includes issues that influence the future of education in the school district. Information collected from stakeholders in all rounds of engagement is reported and summarized at the conclusion of each round and included in interim, draft, and final reports.

We work with you to assemble a committee of diverse leaders that provide community representation throughout the planning process. The committee should include a broad cross-section of the community and can include stakeholders such as parents, students, school staff/administrators, Board members, higher education leaders, community/business organization representatives, and city/county government leaders.

Facilitating Public Meetings

The flow and facilitation of **public meetings** is thoroughly planned and communicated beforehand so that there are no surprises. Prior to these meetings taking place, we will have already presented all content publicly to the Board. We have found the most success conducting these meetings in an open-house format, with all information publicly available ahead of the meetings via a project website.



We collect all **feedback** electronically via an online questionnaire. These focused surveys include all pertinent content, including embedded video presentations. QR codes and links to the surveys are visible throughout the community meeting. Stakeholders can complete the survey at their convenience. Paper surveys can also be provided at the District's request.

At the end of each public engagement session, all online versions of the survey remain open and collecting data for several more days. When the questionnaires close, we report all data—including any qualitative feedback—to the District to continue to inform the process.

PHASE 2: DEVELOPING AND IMPLEMENTING THE PLAN

The Facilities Master Plan emerges from the community engagement process because it is the final product of that engagement, informed and created incrementally by District and community stakeholders. Stakeholders come to operable **consensus** on the:

- Data that will serve as the plan's starting point
- Values and framework that will propel the plan forward
- Constraints that, when positively understood, refine the plan so it becomes an actionable path forward for the school district and the community
- Balance between with the community's long-range growth projections and service needs

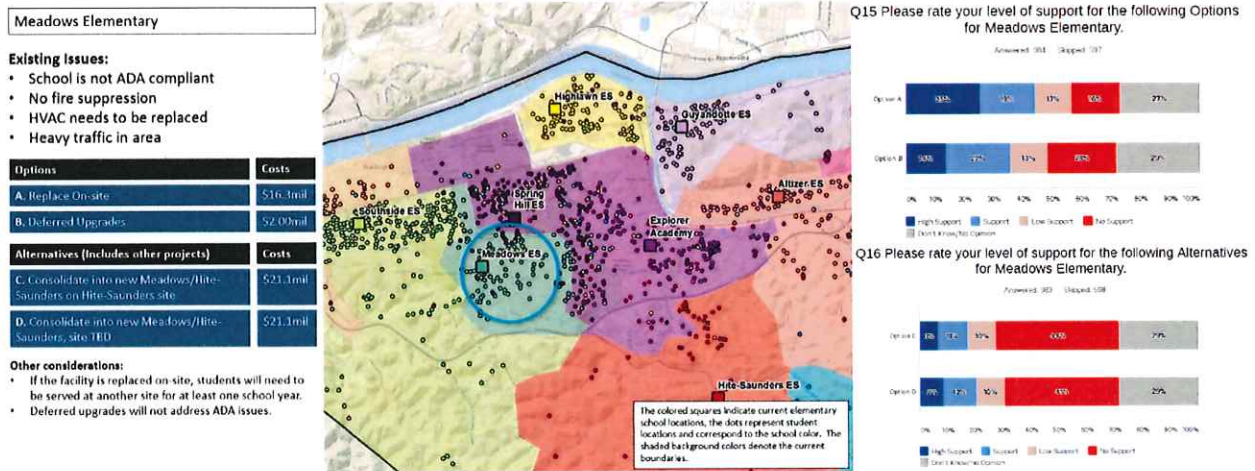
CREATING OPTIONS AND REFINING RECOMMENDATIONS

After meeting regularly with the Committee and at least once with the community at large, we meet with District leadership to draft an initial set of options via data-rich planning workshops. GIS, facility condition, capacity, enrollment, and survey data frame the conversation, and the values and aspirations of District and community stakeholders provide the possibilities for options development.

These workshops start with an "everything is on the table" approach to options, from new construction and rebuilding schools, to repurposing schools, changing grade configurations, and modifying attendance zones, to basic continued repair and maintenance.

Once a viable set of options are developed, we package them into a **Draft Options Report**, developing cost estimates for all options and creating summary analysis that the committee and community stakeholders can use to understand, compare, and contrast each option. It is our practice to build cost estimates with an “all-in” approach, considering the hard and soft costs as well as escalation based on estimates on when the project would likely take place.

The options will identify and evaluate cost benefit options to meet current and future facility needs.



After the Committee, Board, and community at large have reviewed and commented on the draft options, we meet again with District Leadership in another workshop setting to consider stakeholder feedback on the draft options and refine them into a cohesive set of **recommendations** for the FMP. With GCS educational priorities at the forefront of all decisions in this process, the recommendations will emphasize the most efficient use of existing facilities, maximizing the capacity and utilization of current buildings and classroom space. Among the recommendations will be

- Facility use options to achieve parity in academic offerings among elementary, middle, and high school programs
- Space requirements to support future academic programs
- Cost projections based on anticipated funding from local, state, and federal agencies for future capital projects

CREATING THE FINAL PLAN

We work with school district leadership to create the **implementation plan** based on assumed and potential budgets and the logical order for projects.

Our goal is to address projects by priority order as defined by the data and community, while minimizing disruption to students and staff and maximizing project efficiencies.

We create recommended project illustrations and phasing plans for each campus, with refined budget estimates.

We present the final FMP recommendations for Committee review and comment prior to coming to the Board at the conclusion of the process. The plan identifies potential sources of funding from local, State, or Federal agencies. This helps provide a well-informed long-range budget to create an actionable plan to guide the district's major capital investments for years to come.

STATEMENT OF WORK FACILITIES MASTER PLAN

Cooperative Strategies, LLC (CS or “We”) will provide Facilities Master Planning services to Greeneville City School System (GCS or “School District”). A facilities master plan provides clear direction to administrators, policy makers, and the community regarding how a school district should address facility needs. The table below details the specific activities and tasks we will perform under this Statement of Work.

ACTIVITY	TASKS
<p>1. Project Kick-Off</p>	<p>1. Facilitate Kick-Off Meeting</p> <p>CS will facilitate a kick-off meeting to ensure clear agreement on project objectives and expectations and gain consensus on the process. We will use this meeting with administration to fully familiarize ourselves with the School District’s mission and function and discuss approach. We will discuss roles, functions, and responsibilities, anticipate issues, and prepare for the project roll-out.</p>
<p>2. Collect & Review Data</p>	<p>2.A. Background Data Collection</p> <p>CS will collect background information about the School District. The data may include such things as:</p> <ul style="list-style-type: none"> • 10-year enrollment projections • Demographic profiles • Geographic Information Systems data • Capacity & utilization analysis of facilities • Facility condition & educational adequacy evaluations • School District academic program information and student achievement • Financial and budgetary information • District’s strategic plan <p>2.B. Report Preparation</p> <p>CS will compile the data collected into a background report summarizing GCS ’s current situation.</p>

ACTIVITY	TASKS
<p>3. Community Engagement: <i>Assemble Committee</i></p>	<p>3.A. Committee Formation</p> <p>CS will assist the School District to form a committee to facilitate the development and implementation of the facilities master planning process. This committee will:</p> <ul style="list-style-type: none"> • Represent a broad cross-section of school and non-school community members • Include representatives from all GCS school facilities <p>3.B. Committee Meeting Facilitation</p> <p>CS will facilitate up to 4 committee meetings.</p>
<p>4. Develop Options</p>	<p>4.A. Options Work Sessions</p> <p>CS will facilitate a work session with the School District to develop options from the data collected and input gathered. The options will identify the basic scope of the renovations, replacements, additions, new construction, and closures/ consolidations, as well as macro costs.</p> <p>4.B. Options Packet</p> <p>CS will develop a packet that outlines each of the options drafted during the work session. GCS can then use this illustrative, informative packet at community meetings to collect relevant feedback.</p>
<p>5. Community Engagement: <i>Community Meeting</i></p>	<p>5.A. Community Meeting</p> <p>CS will facilitate a community meeting to collect feedback around educational framework. Feedback will be both quantitative (e.g., level of support) and qualitative (e.g., open-ended responses to questions). Sample questions/requests include:</p> <ul style="list-style-type: none"> • Which of the District’s strategic planning goals are most relevant to align with the facility master plan? • Which local and national trends in education are having the most affect on facility usage? • How do you envision aligning space requirements of future academic programs with current facilities? • Which trends in the local and regional labor market will affect future academic programs for middle and high school students?

ACTIVITY	TASKS
	<p>5.B. Outreach Deliverable Preparation</p> <p>CS will prepare any informational and survey materials (e.g., conceptual designs, documents, flyers, presentations, questionnaires, etc.) to be used during outreach meetings.</p>
<p>6. Develop Recommendations & Prepare Report</p>	<p>6.A. Recommendations Development</p> <p>CS will facilitate a work session with the School District to refine the options. We will incorporate input from the community meeting and the committee to develop a recommended action for each GCS facility.</p> <p>6.B. Final Report</p> <p>CS will create a final report outlining the recommendations developed in the process. We will present the recommendations in phases showing which facilities should be addressed first and then the subsequent order of remaining facilities. For each facility, we will indicate the approximate cost of renovations, additions, replacements, and new construction.</p> <p>6.C. Present Report/Recommendations at School Board Meeting</p> <p>At the School District’s request, CS will participate in up to one School Board and/or School District administration meetings to present the final report and the recommendations therein.</p>



PAST PROJECTS

PROVEN SUCCESS STORIES

SAMPLE DEMOGRAPHIC CLIENTS

URBAN AND LARGE DISTRICTS

Baltimore City Public Schools, MD
 Baltimore County Public Schools, MD
 Bridgeport Public Schools, CT
 Buffalo City Schools, NY
 Canton City Schools, OH
 Charleston County School District, SC
 Cleveland Metropolitan School District, OH
 District of Columbia Public Schools, Wash. D.C.
 Duval County Public Schools, FL
 El Paso Independent School District, TX
 Fort Wayne Community Schools, IN
 Huntsville City Schools, AL
 Iowa City Community School District, IA

Manhattan Beach Unified School District, CA
 Memphis City Schools, TN
 Norfolk Public Schools, VA
 Oakland Unified School District, CA
 Palm Beach County Schools, FL
 Paterson Public Schools, NJ
 Poudre School District, CO
 Redondo Beach Unified School District, CA
 Savannah-Chatham County Schools, GA
 School District of Philadelphia, PA
 Seattle Public Schools, WA
 Tuscaloosa City Schools, AL
 Wake County Public School Systems, NC

SUBURBAN DISTRICTS

Alliance City Schools, OH
 Auburn City Schools, AL
 Avon Lake City Schools, OH
 Azusa Unified School District, CA
 Brentwood Union School District, CA
 Cambrian School District, CA
 Center Grove Community School Corp., IN
 Champaign Unit 4 School District, IL
 City Schools of Decatur, GA
 Conejo Valley Unified School District, CA
 Dedham Public Schools, MA
 Desert Sands Unified School District, CA
 Dublin City Schools, OH
 Fremont Unified School District, CA
 Glenview Public School District 34, IL
 Hamilton Southeastern Schools, IN
 Hesperia Unified School District, CA
 Hilliard City Schools, OH
 Howard County Public Schools, MD
 Kingsport City Schools, TN
 Livermore Valley Joint Unified School District, CA
 Lodi Unified School District, CA
 Manassas City Public Schools, VA

Martin County School District, FL
 Mason City Schools, OH
 Menifee Union School District, CA
 Murrieta Valley Unified School District, CA
 Norris School District, CA
 North Allegheny School District, PA
 Olentangy Schools, OH
 Palm Springs Unified School District, CA
 Peters Township School District, PA
 Pickerington Schools, OH
 Richland School District, CA
 Rochester Public Schools, MN
 Rockwood Schools, MO
 Rosedale Union School District, CA
 Roseville Joint Union High School District, CA
 San Gabriel Unified School District, CA
 Southampton Public Schools, NY
 South-Western City Schools, OH
 Strongsville City Schools, OH
 Thompson School District, CO
 Tracy Unified School District, CA
 Union School District, CA
 Worthington Schools, OH

RURAL DISTRICTS

Anthony Wayne Local Schools, OH
 Big Walnut Local Schools, OH
 Byron Union School District, CA
 Caledonia Community Schools, MI
 Caroline County Schools, VA
 Goochland County Public Schools, VA
 Louisville City Schools, OH
 Marshall County Schools, WV
 Mayfield City Schools, OH
 Mecklenburg County Schools, VA
 New Hanover County Schools, NC
 N. Monterey County Unified School District, CA
 Northwest Arctic Borough School District, AK
 Norton City Schools, OH
 Orcutt Union School District, CA
 Orland Park Consolidated High SD 230, IL
 Paso Robles Joint Unified School District, CA
 Rio Bravo-Greeley Union School District, CA
 Rockbridge County Schools, VA
 Sullivan County Schools, TN
 Valley Center-Pauma Unified School District,
 Vinton County Schools, OH
 Wyoming County Schools, WV

STATE AGENCIES



Ohio Facilities Construction Commission: We have worked with the OFCC team to develop 10-year enrollment projections for Ohio school districts entering the Classroom Facilities Assistance Program (CFAP) and the Expedited Local Partnership Program (ELPP). We have completed enrollment projections for more than 450 school districts.



Arkansas Division of Public School Academic Facilities: As part of the 2004 Statewide School Facilities Assessment, we developed 10-year enrollment projections for every school district in Arkansas. As districts decline, grow, or consolidate, we revisit and update each district's projections annually.

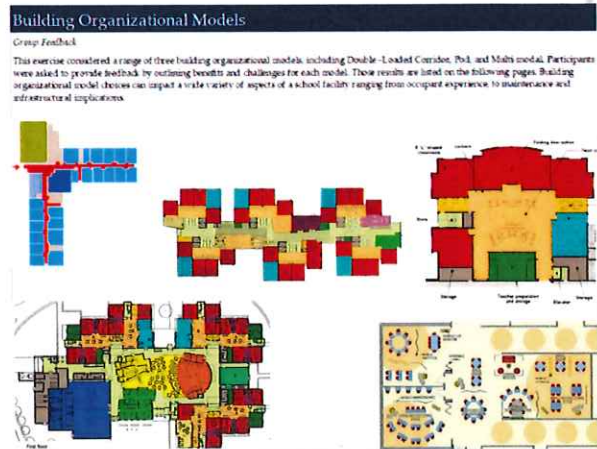


RIDE

Rhode Island Department of Education: As part of the 2017 Statewide School Facilities Assessment, we developed 10-year enrollment projections for every district in Rhode Island.

SAMPLE EDUCATIONAL SPECIFICATIONS CLIENTS

Arlington Independent School District, TX
 Bélen Consolidated Schools, NM
 Central Consolidated School District, NM
 Decatur City Schools, AL
 Dedham Public Schools, MA
 Department of Defense Education Activity (DoDEA)
 Durham Public Schools, NC
 Estancia Municipal School District, NM
 Fulton County Schools, GA
 Gallup-McKinley County Schools, NM
 Geneva School, FL
 Grand Rapids Public Schools, MI
 Grants Cibola County Schools, NM
 Groveport Madison Schools, OH
 Huntsville City Schools, AL
 Johnstown-Monroe School District, OH
 Kodiak High School, AK
 Los Lunas Schools, NM
 Montgomery Public Schools, AL
 New Mexico Public Schools Facilities Authority
 Norfolk Public Schools, VA
 Raton Public Schools, NM
 Valdez City School District, AK
 Virginia Beach City Public Schools, VA
 Warren County School District, PA
 William M. Davies, Jr. Career and Technical High School, RI
 Worthington Schools, OH



SAMPLE FACILITIES MASTER PLANNING CLIENTS

URBAN AND LARGE DISTRICTS

Adams County School District 14, CO
 Akron Public Schools, OH
 Aldine Independent School District, TX
 Anchorage School District, AK
 Arlington Independent School District, TX
 Austin Independent School District, TX
 Baltimore City Public Schools, MD
 Baltimore County Public Schools, MD
 Bridgeport Public Schools, CT
 Broward County Public Schools, FL
 Charleston County School District, SC
 Chicago Public Schools, IL
 Cincinnati Public Schools, OH
 Clark County School District, NV
 Cleveland Metropolitan School District, OH
 Colorado Springs School District 11
 Columbus Public Schools, OH
 Dayton Public Schools, OH
 Detroit Public Schools, MI
 District of Columbia Public Schools, Wash., D.C.
 Duval County Public Schools, FL
 El Paso Independent School District, TX
 Fargo Public Schools, ND
 Fort Bend Independent School District, TX
 Fulton County Schools, GA
 Grand Rapids Public Schools, MI
 Guilford County Schools, NC
 Jefferson County Public Schools, CO
 Jefferson County Public Schools, KY
 Juneau School District, AK
 Long Beach Unified School District, CA
 Memphis City Schools, TN
 Montgomery Public Schools, AL
 Norfolk Public Schools, VA
 Omaha Public Schools, NE
 Orange County Public Schools, FL
 Paterson Public Schools, NJ
 Providence Public Schools, RI
 Richmond Public Schools, VA
 School District of Philadelphia, PA
 Scottsdale Unified School District, AZ
 Shelby County Schools, TN
 Toledo Public Schools, OH
 Tuscaloosa City Schools, AL
 Virginia Beach City Public Schools, VA
 Waterbury Public Schools, CT

SUBURBAN DISTRICTS

Berea City School District, OH
 Beverly Hills Unified School District, CA
 Birmingham Public Schools, MI
 Champaign Unit 4 School District, IL
 Cleveland Heights-University Heights City School District, OH
 Dripping Springs Independent School District, TX
 Gregory-Portland Independent School District, TX
 Gulfport School District, MS
 Halifax County Public Schools, VA
 Hilliard City Schools, OH
 Hudson City Schools, OH
 Kettering City Schools, OH
 Klein Independent School District, TX
 Ladue School District, MO
 Lewis-Palmer School District, CO
 Manassas City Public Schools, VA
 Manhasset Public Schools, NY
 Martin County Public Schools, FL
 Monongalia County Schools, WV
 Moon Area School District, PA
 Northville Public Schools, MI
 Orange Local Schools, OH
 Palm Beach County Public Schools, FL
 Poudre School District, CO
 Pulaski County Schools, VA

Rochester Community Schools, MI
Rockwood School District, MO
Rocky River City Schools, OH
Romeo Community Schools, MI
School District of Fairfield County, SC
School District of Janesville, WI
Southampton Union Free School District, NY
Southwest Roanoke County Schools, VA

South-Western City Schools, OH
State College Area School District, PA
Sycamore Community Schools, OH
Thompson School District, CO
Tuloso-Midway Independent School District, TX
Twinsburg City Schools, OH
West Geauga Local Schools, OH
Whitmore Lake Public Schools, MI

RURAL DISTRICTS

Brush School District, CO
Calhan School District, CO
Campbell County Schools, VA
Deer Trail School District, CO
Grant-Hardy County Schools, WV
Marshall County Schools, WV
Ohio County Schools, WV
Randolph County Schools, WV
Sampson County Schools, NC
Sweetwater County School District #2, WY
Switzerland of Ohio Local Schools, OH
Tri-Valley Local Schools, OH
Uinta #1 School District, WY

KEY PERSONNEL

YOUR TEAM OF INDUSTRY EXPERTS



**ANN HOFFSIS, REFP, PARTNER
CHIEF OPERATING OFFICER**

Ann Hoffsis has been with the firm for more than 23 years and worked in 34 states and Honduras. During this time, she has worked on a variety of projects, including educational specifications, facility master planning, capacity analysis, educational adequacy, and enrollment projections.

Ann's primary focus has been on enrollment projections, and she has completed more than 3,000 projections for school districts of all shapes and sizes. She has also provided enrollment projections and enrollment projections training services to state agencies, including the Office of the D.C. Auditor (ODCA), the Ohio School Facilities Commission (OSFC), the Arkansas Division of Public Schools Academic Facilities and Transportation, the Rhode Island Department of Education (RIDE), and the New Mexico Public School Facilities Authority (NMPSFA).

Education

- B.A., Psychology, The Ohio State University
- GIS Certificate, Columbus State Community College
- Psychology of Leadership Certificate, Cornell University

Areas of Expertise

- Enrollment Projections
- Enrollment Projections Review
- Enrollment Projection Training

Notable Accomplishments

- Collaborated with The Ohio State University to develop enrollment projection software S.T.E.P.
- Recognized Educational Facility Planner (REFP)
- Member, Association for Learning Environments (A4LE)

Sample Experience

Arkansas Division of Public Schools Academic Facilities and Transportation

Enrollment Projections

Charlotte-Mecklenburg Schools, NC

Enrollment Projections; Student Potential Analysis

City Schools of Decatur, GA

Enrollment Projections

District of Columbia

A Study of Enrollment Projections for D.C.'s Public Schools

Duval County Public Schools, FL

Enrollment Projections

Fort Wayne Community Schools, IN

Enrollment Projections

Glenview School District #34, IL

Enrollment Projections

Hilliard City Schools, OH

Enrollment Projections; Student Potential Analysis

Howard County Public School System, MD

Enrollment Projections Review

Huntsville City Schools, AL

Enrollment Projections

Iowa City Community School District, IA

Enrollment Projections

Jefferson City Schools, GA

Enrollment Projections

Jefferson County Public Schools, CO

Enrollment Projections

Norfolk Public Schools, VA

Enrollment Projections

Oakland Unified School District, CA

Enrollment Projections Review, Enrollment Projections

Olentangy Schools, OH

Enrollment Projections; Boundary Planning; Student Potential Analysis

Pickerington Schools, OH

Enrollment Projections

Poudre School District, CO

Enrollment Projections

Rhode Island Department of Education

Enrollment Projections

Tuscaloosa City Schools, AL

Enrollment Projections

Worthington Schools, OH

Enrollment Projections



DAVID STURTZ, PARTNER EXECUTIVE DIRECTOR

David Sturtz has over a decade of experience as a teacher, educational entrepreneur, and most recently as a strategic planner with Cooperative Strategies, which he joined in 2012. He has overseen the instruction of more than 2,000 students, hired and managed hundreds of teachers and supplemental instructors, and worked with districts across the country.

David's focus is on merging educational program vision with condition and demographic data. He works with school districts to ensure their facilities and programs improve educational prospects and create the best learning environments for their students.

Education

- M.T.S., Concentration, Ethics, The Methodist Theological School in Ohio
- B.A., Psychology, Ohio Wesleyan University

Areas of Expertise

- Educational Specifications
- Facilities Assessments
- Facilities Master Planning
- Community Engagement

Notable Accomplishments

- Member, Association for Learning Environments (A4LE)
- Conversationally fluent in Spanish
- Certified Assessor, Oregon Dept. of Education

Sample Experience

Alaska Department of Education, AK
Prototypical School Design Study

Aldine Independent School District, TX
Facilities Master Plan

Anchorage City Schools, AK
Educational Adequacy Assessments

Arlington Independent School District, TX
Facilities Master Plan; Technology Plan; Educational Specifications

Auburn City Schools, AL
Strategic Planning; Educational Specifications; Facilities Master Plan

Bandon School District #54, OR
Facilities Assessments; Facilities Master Plan

Chesapeake Public Schools, VA
Facilities Master Plan

Colorado Springs School District 11, CO
Facilities Master Plan

El Paso Independent School District, TX
Facilities Master Plan; Educational Specifications

Fort Bend Independent School District, TX
Facilities Master Plan

Geneva School, FL
Educational Specifications

Guilford County Schools, NC
Facilities Master Plan

Hawaii Department of Education, HI
Statewide Facilities Master Plan

Huntsville City Schools, AL
Strategic Career Tech Ed Planning; Educational Specifications; Facilities Master Plan

Klein Independent School District, TX
Facilities Master Plan

Manassas City Public Schools, VA
Facilities Master Plan Update

Marion City Schools, OH
Facilities Assessments

Olentangy Schools, OH
Facilities Assessments

Paterson Public Schools, NJ
Facilities Master Plan

Rhode Island Department of Education, RI
Statewide Facilities Master Plan

Roseburg Public Schools, OR
Facilities Assessments; Facilities Master Plan

Suffolk Public Schools, VA
Facilities Master Plan



JUSTIN RICH, PARTNER EXECUTIVE DIRECTOR

Justin Rich brings over 18 years of experience in school facilities planning and finance. He assists LEAs with their facilities master planning efforts, specialized demographic

analyses, and boundary studies. He has been involved in numerous community outreach efforts related to facility planning, school attendance boundaries/closures, trustee area redistricting and general obligation bond elections.

In addition to being actively involved with client relations and outreach endeavors, Justin has presented on various topics at industry conferences and events.

Education

- M.P.A., Public Administration, California State University, Long Beach
- B.A., Political Science, University of California, Los Angeles

Areas of Expertise

- Demographic Studies
- Boundary Planning
- Development Impact Analyses
- Community Engagement
- Facilities Master Planning
- Facility Funding

Notable Accomplishments

- Facilitated multiple community outreach processes and townhall forums related to facilities master plans, school attendance boundary processes, and school closures.
- Previously advised on nearly \$7 billion in municipal bond transactions for local education agencies.

Sample Experience

- Beaumont Unified School District, CA**
Developer Fee Justification Studies; Financial Advisory
- Brentwood Union School District, CA**
Financial Advisory
- Castro Valley Unified School District, CA**
Bond Election Services; Financial Advisory
- Lake Elsinore Unified School District, CA**
Boundary Planning; Developer Fee Justification Studies; Facilities Master Planning; Demographic Analysis; Developer Negotiations
- Lake Tahoe Unified School District, CA**
Financial Advisory
- Los Angeles Community College District, CA**
Financial Advisory
- Menifee Union School District, CA**
Financial Advisory; Demographic Analysis; Developer Negotiations; Enrollment Projections
- Moreland School District, CA**
Enrollment Projections; Boundary Planning; Developer Fee Justification Studies
- Mountain View School District, CA**
Developer Negotiations; Developer Fee Justification Studies; Bond Election Services; Financial Advisory
- Norris School District, CA**
Facilities Master Plan; Financial Advisory
- Ojai Unified School District, CA**
Enrollment Projections
- Oakley Union Elementary School District, CA**
Bond Election Services; Financial Advisory
- Pasadena Unified School District, CA**
Boundary Planning; Developer Fee Justification Studies; Redevelopment
- Richland School District, CA**
Facilities Master Planning; Developer Fee Justification Studies; Enrollment Projections
- San Dieguito Union High School District, CA**
Long Range Facilities Task Force; Bond Election Services; Financial Advisory
- San Gabriel Unified School District, CA**
Developer Fee Justification Studies, Facilities Usage Fee Studies
- Santa Monica Community College District, CA**
Financial Advisory
- Woodland Joint Unified School District, CA**
Developer Mitigation Analysis; Developer Fee Justification Studies; Bond Election Services; Financial Advisory



KAREN JACKSON
(FORMERLY DANIEL-HAMBERG)
SENIOR DIRECTOR

Karen Jackson joined Cooperative Strategies in 2015 and is involved in many of the facility planning and demographic services we provide K-12 school districts.

She analyzes capacity and utilization data to determine boundary opportunities to help school districts address their facilities' needs. She also develops a variety of housing analyses—including student potential and subdivision yield studies—to help school districts understand and analyze their enrollment.

Karen creates illustrative maps, charts, and tables that demonstrate the needs of school districts in clear, meaningful ways. This helps school boards and district administrative staff understand the impacts that planned or future housing development may have on their facilities.

Education

- B.A., Geography, Wittenberg University

Areas of Expertise

- Geographic Information Systems (GIS)
- Housing and Residential Analyses
- Boundary Planning
- Capacity & Utilization Studies

Notable Accomplishments

- Member, Association for Learning Environments (A4LE)

Publications

School Construction News, contributor (e.g., "Interior Design Trends Defining Schools This Year" and "Functionality Isn't Set in Stone When it Comes to School Design")

School Planning & Management, contributor (e.g., "Flexible Space Inspires Innovation: Multi-Purpose Training Facilities Follow 21st-Century Learning Trends" and "Fulfilling a Primary Need: Redefining the 21st-Century School Library")

Notable Accomplishments

- Recognized Educational Facility Planner (REFP)
- Member, Association for Learning Environments (A4LE)

Sample Experience

Baltimore City Schools, MD

Rezoning Feasibility Study

Champaign Unit 4 Schools, IL

Boundary Planning; Subdivision Yield Analysis

Charlotte-Mecklenburg Schools, NC

Enrollment Projections; Student Potential Analysis

City Schools of Decatur, GA

Grade Configuration Planning; Boundary Planning; Subdivision Analysis

Columbia Public Schools, MO

Boundary Planning

Dublin City Schools, OH

Student Potential Analysis

Fort Bend Independent School District, TX

Boundary Planning; Demographic Analysis

Fort Wayne Community Schools, IN

Demographic Analyses; Boundary Planning

Hilliard City Schools, OH

Student Potential Analysis

Idaho Falls School District 91, ID

Boundary Planning

Jefferson City Schools, MO

Boundary Planning

Jefferson County Public Schools, KY

Boundary Planning

Kirkwood School District, MO

Boundary Planning; Facilities Planning

Olentangy Schools, OH

Boundary Planning; Student Potential Analysis

Polk County Public Schools, FL

Boundary Planning

Rhode Island Department of Education, RI

Statewide Facilities Master Plan & Assessments

Sierra Sands Unified School District, CA

Facilities Master Plan

Teays Valley Local Schools, OH

Boundary Planning

Webster Groves School District, MO

Facilities Master Plan; Boundary Planning

Williamsburg-James City County Public Schools, VA

Boundary Planning

Worthington Schools, OH

Facilities Master Plan; Capacity Analyses



KERRIANNE WOLF, REFP
SENIOR DIRECTOR

Kerriane Wolf has been assisting K-12 school districts across the country with their facilities planning needs for almost 20 years. She leads educational specifications, facilities master planning, enrollment projections and training, capacity and utilization studies, strategic planning projects, and educational adequacy assessments. Kerriane assisted in the review of the New Mexico Public School Facilities Authority's (NMPSFA's) *Adequacy Planning Guide*, which has resulted in greater clarity of scope and consistency through the needs assessment, planning, design, and construction phases of projects throughout the state. All the public-school projects she has led in New Mexico have been in partnership with the NMPSFA.

Education

- B.S., Elementary Education, Gifted & Talented Education, Kent State University

Areas of Expertise

- Educational Specifications
- Facilities Master Planning
- Community Engagement
- Capacity & Utilization Studies
- Strategic Planning
- Educational Adequacy Assessments

Publications

School Construction News, contributor (e.g., "Interior Design Trends Defining Schools This Year" and "Functionality Isn't Set in Stone When it Comes to School Design")

School Planning & Management, contributor (e.g., "Flexible Space Inspires Innovation: Multi-Purpose Training Facilities Follow 21st-Century Learning Trends" and "Fulfilling a Primary Need: Redefining the 21st-Century School Library")

Notable Accomplishments

- Recognized Educational Facility Planner (REFP)
- Member, Association for Learning Environments (A4LE)
- Facilities that Kerriane has planned have received:
 - 2015 LEolutions Planning & Design Awards, Project of Distinction/New Construction
 - 2015 Len Mackler Award

Sample Experience

Arlington Independent School District, TX
Educational Specifications

Belén Consolidated Schools, NM
Belén Family School Educational Specifications

Central Consolidated School District, NM
Newcomb Elementary School Educational Specifications; Newcomb Campus Facilities Master Plan Update

Dedham Public Schools, MA
Early Childhood Education Center

Estancia Municipal School District, NM
Middle School Educational Specifications

Fulton County Schools, GA
District-wide Educational Standards; STEM Educational Specifications

Gallup-McKinley County Schools, NM
Crownpoint Elementary School Educational Specifications

Grand Rapids Public Schools, MI
High School Educational Specifications; Building Improvement Plan; Strategic Plan Update

Grants Cibola County Schools, NM
Los Alamos MS Educational Specifications; Utilization Study of the Elementary Feeder Schools; Facility Master Plan Updates

Los Lunas Schools, NM
High School Educational Specifications

Raton Public Schools, NM
Elementary School Educational Specifications

State of New Mexico PSFA
Educational Specifications Standards Review

Tillamook School District 9, OR
Educational Facility Assessment & Long-Range Facility Planning

Tucumcari Public Schools, NM
Facility Master Plan Update

Valdez City School District, AK
Middle School Educational Specifications

Virginia Beach City Public Schools, VA
Facilities Master Plan; District-wide High School Educational Specifications

William M. Davies, Jr. Career & Technical High School, RI
Educational Specifications

REFERENCES

TRANSPARENCY IS TRUST

REFERENCES

The best proof of our ability to deliver comes via the testimony of current and past clients. Below we provide contact information for our partners at K-12 school districts who can speak to our expertise, dedication, and commitment. We have completed over 2000+ projects for public school districts nationwide including facility master plans, enrollment projections, and housing studies/student yield analyses. Below are references for your consideration. The three pages that follow (pages 46-48) provide details related to the relevant work we completed for these three districts.

CLIENT	CONTACT INFORMATION
<p>Kingsport City Schools Kingsport, Tennessee</p>	<p>Dr. R. Andrew True Assistant Superintendent - Administration 400 Clinchfield Street, Suite 200 Kingsport, TN 37660 423.378.2130 atrue@k12k.com</p>
<p>Colorado Springs School District 11 Colorado Springs, Colorado</p>	<p>Hannah F. White, RA, LEEDAP BD+C Facilities Capital Program Manager 5240 Geiger Blvd. Colorado Springs, CO 80915 719.499.1464 HANNAH.WHITE@d11.org</p>
<p>Newport News Public Schools Newport, Virginia</p>	<p>Donald "Rusty" Fairheart, MBA Chief Operating Officer 12465 Warwick Boulevard Newport News, VA 23606 757.591.4511 donald.fairheart@nn.k12.va.us</p>

COLORADO SPRINGS D11 COLORADO SPRINGS, COLORADO



ABOUT D11

CS PROJECTS SINCE 2019

Colorado Springs School District 11 (D11) is the tenth largest school district in Colorado, with 55 facilities encompassing over 3.7 million gross square feet. D11 serves 26,000 students in 33 elementary schools, nine middle schools, five high schools, and several alternative sites.

- Facilities Assessments
- Consolidation
- Facilities Master Plan

PROJECT OVERVIEWS

2020 | Facilities Assessments | Team Member: Ben Clark

Detailed facility information is essential in the development of any FMP. To inform the development of the FMP, CS assessed all of D11's 55 facilities. This included district offices, district managed schools and the charter schools authorized by D11. This information provided critical information for development of options and the prioritization of repairs and future facility investments.

2019 | Consolidation | Team Member: David Sturtz

As a school district grows and evolves overtime, enrollment changes may be influenced by demographics, aging facilities, or charter school impacts. Cooperative Strategies was hired to develop a comprehensive FMP that would address the declining enrollment and the inequity of school facilities. The FMP incorporated a consolidation of small schools to provide students with new facilities and better learning environments.

2020-22 | Facilities Master Plan | Team Member: David Sturtz

Flexibility is critical in the FMP process. The D11 project kicked-off in the middle of the first wave of the COVID-19 pandemic in March 2020. Despite the challenges, we assessed all the schools, engaged the community virtually, we hosted over 70 District, committee, and community meetings, complete with small-group work and consensus-building exercises. Our team worked with the District to identify facility priority needs over five and ten-year horizons.

FACILITY PRIORITY NEEDS

CONTACT INFORMATION



Hannah F. White, RA, LEEDAP BD+C
Facilities Capital Program
Project Manager

HANNAH.WHITE@d11.org

719.499.1464

NEWPORT NEWS PUBLIC SCHOOLS NEWPORT, VIRGINIA



ABOUT NNPS

Located on Virginia’s southeast coast, Newport News Public Schools serves the 5th most populous city in Virginia, a hub for ship-building, and adjacent to the largest naval base in the world. NNPS serves ~25,000 students on 41 campuses.

CS PROJECTS SINCE 2018

- Capacity Study
- Enrollment Projections
- Facilities Master Plan

PROJECT OVERVIEWS

2019 | Capacity Study | Team Member: Ann Hoffsis

Understanding how facilities are used and related capacity provides data to optimize utilization of space and program supports. CS digitized every floor plan at every NNPS school, matching room use and class size data to each space to create a comprehensive understanding of school capacity and classroom optimization.

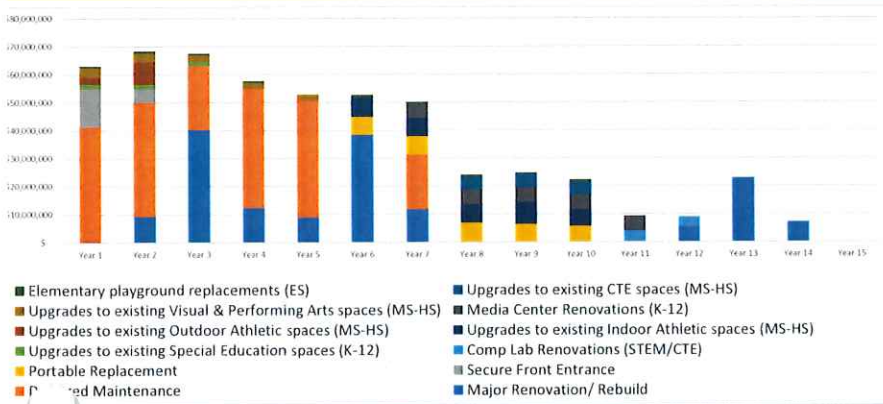
2019 | Enrollment Projections | Team Member: Ann Hoffsis

To provide maximum flexibility for future planning, CS performed 10-year historical analyses and projections both based on schools of attendance and where students live.

2020-22 | Facilities Master Plan | Team Member: David Sturtz

A transparent community engagement process can drive a successful FMP process. NNPS had more than 2,400 survey respondents and met with a committee five times to work with the survey data collected and recommend a plan forward. The consensus was clear; the majority of committee and survey respondents believed it was time to make major investments in their schools to address longstanding building condition needs, address safety and security challenges, and programming investments at the elementary, middle, and high school levels.

SURVEY RESULTS



CONTACT INFORMATION

Donald “Rusty” Fairheart, MBA
Chief Operating Officer
donald.fairheart@nn.K12.va.us

757.591.4511

KINGSPORT CITY SCHOOLS

KINGSPORT, TENNESSEE



ABOUT KSD

Located in the northeast corner of the state, just across the Kentucky state line, Kingsport City Schools serves a student population of 7,500 students in grades Pre-K-12.

CS PROJECTS SINCE 2023

- Facilities Condition Update
- Student Potential
- Facilities Master Plan

PROJECT OVERVIEWS

2023 | Facilities Condition Update | Team Member: David Sturtz

A comprehensive data set is critical to the development of a facilities master plan. Therefore, CS assisted in updating facilities' assessments to refine the facilities condition index for the district. This work allowed the district to have a comprehensive understanding of the needs of its facilities and the priorities for investment in its facilities. This information was incorporated in the option development and final recommendations made for Kingsport's long-range facilities master plan.

2023 | Student Potential | Team Member: Karen Daniel-Hamberg

Analysis was completed for the school district to review the active or proposed housing developments, the potential student yield from those developments, and the probable impact to enrollment at district schools over the next 30 years.

2023 | Facilities Master Plan | Team Member: David Sturtz

CS incorporated the datasets, including the update to the facilities condition, the potential impact of various housing developments on enrollment, how buildings were used, and the educational learning experiences of the students within the district's facilities. CS provided a roadmap for the district for the next five years, prioritizing the redrawing of boundaries, a new elementary school, expansion of facilities to increase learning opportunities and increase middle school program opportunities.

ELEMENTARY SCHOOLS' SNAPSHOT

CONTACT INFORMATION

Building Name	GSF	% smaller than Adams ES	Projected Utilization	Proj. Util. w/ Housing Yield
John Adams Elementary School	94,000		82%	94%
George Washington Elementary School	85,860	-9%	99%	105%
Andrew Johnson Elementary School	83,886	-11%	98%	99%
Thomas Jefferson Elementary School	79,068	-16%	97%	99%
Abraham Lincoln Elementary School	72,562	-23%	78%	88%
Andrew Jackson Elementary School	68,017	-28%	93%	105%
Theodore Roosevelt Elementary School	40,665	-57%	80%	83%
John F. Kennedy Elementary School	40,421	-57%	58%	58%

Dr. R. Andrew True
 Assistant Superintendent - Administration
 400 Clinchfield Street, Suite 200
 Kingsport, TN 37660
atrue@k12k.com
 423.378.2130

PROJECT SCHEDULE

PROJECT SCHEDULE

The project schedule below illustrates a tentative timeframe for each task based on available data from the RFP. CS will meet with the executive team at the beginning of the project to establish accurate timelines. We understand GCS may have deadlines and we will work to meet these deadlines across all services.

Greenville City Schools: <i>Draft Schedule</i> - Approximately 732 to 795 hours to complete all services	2023					2024			
	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Project Kick-off & Board Meeting, Visioning, Framework for Planning, and Committee Selection, Data Review & Background Report	█	█	█						
Demographics & Enrollment Projections	█	█	█						
Housing Study	█	█	█						
Board Presentation: SC composition & engagement schedule		█							
Committee Meeting #1: Data Review & Planning Process Introduction			█						
Committee Meeting #2: Draft Framework for Options Development				█					
Board Presentation: Draft Framework for Options Development				█					
Community Meeting: Data Review & Planning Framework					█				
Survey 1					█				
Exec. Team: Draft Options						█			
Committee Meeting #3: Review Draft Options and Survey Results						█			
Board Presentation: FMP Options						█			
Exec. Team: Draft FMP Recommendations							█		
Board Meeting: Review Draft FMP Recommendations							█		
Committee Meeting #4: Review Draft Recommendations								█	
Final Report & Board Presentation									█



FEE PROPOSAL

FEE PROPOSAL

Listed in the table below, Cooperative Strategies, LLC (“CS” or “We”) is providing a range of services and available options for Planning Services to Greenville City School System (“GCS” or “School District”). These service descriptions are based on the Statements of Work previously listed in this proposal. The total fee amount will be dependent on the selected service options. This fee shall be payable in monthly installments based on the percentage of work completed.

SERVICE DESCRIPTION	PROPOSED FEE	ESTIMATE OF HOURS TO COMPLETE
Enrollment & Demographics		
Option 1A – Enrollment Projections by School of Attendance	\$9,000 (*plus reimbursable expenses)	50
Option 1B – Enrollment Projections by Boundary of Residence	\$12,000 (*plus reimbursable expenses)	82
Option 1C – Enrollment Projections by School of Attendance and Boundary of Residence	\$18,000 (*plus reimbursable expenses)	113
Student Potential Analysis	\$25,000 (*plus reimbursable expenses)	156
Facilities Planning Qualifications incorporates Fees & Hours for Educational Specifications, Financial, and Community Engagement		
Facilities Planning	\$105,500 (*plus reimbursable expenses)	526
OPTIONAL LANGUAGE: The total hours and fee amount will be dependent on the enrollment projections descriptions selected above	Range: \$139,500 to \$148,500 (Includes estimate of reimbursable expenses of \$16,000)	732 to 795 hours

***REIMBURSABLE EXPENSES**

In addition to professional fees, GCS is responsible for expenses including travel (mileage, lodging, parking, etc.), meals, all printing, postage, overnight delivery service, and other direct expenses associated with the project. Reimbursable expenses will be invoiced monthly with professional fees. ***The estimate of reimbursable expenses, included in the fees, is \$16,000.***

STANDARD HOURLY RATES

Should GCS request meetings or additional services outside the scope outlined in this proposal—such as our attendance at Board Meetings—the fee for such services, including meeting preparation and travel time, will be billed at the standard hourly rates below, plus reimbursable expenses.

POSITION	RATE
CEO	\$300/hour
Executive Director / Partner	\$275/hour
Senior Director	\$225/hour
Senior Associate Director	\$200/hour
Associate Director	\$175/hour
Senior Associate	\$150/hour
Associate	\$120/hour



FORMS

HOLD HARMLESS AGREEMENT

This Hold Harmless Agreement is between Cooperative Strategies
Name of Contractor

(hereinafter Contractor), and the Town of Greeneville and Greeneville City Schools named in this Request for Proposals.

Contractor agrees that as a condition precedent to "Contractor" being awarded a contract from the Town of Greeneville and Greeneville City Schools, "Contractor" agrees to indemnify, protect, defend, and hold harmless the Town of Greeneville and Greeneville City Schools, its Board Members, agents, and employees from all judgments, claims, demands for payment, suits or actions of every nature and description brought against the Town, School District, its Board Members, agents and employees alleging injuries or damages sustained by any person arising out of or in the course of "Contractor's" providing goods or services to the Town and School District.

(Name of Contractor)

BY: Ann Hoffsis

TITLE: Chief Operating Officer

State of Tennessee

County of Greene

I Ann Hoffsis personally appeared before me, the undersigned, with whom I am personally acquainted and who, upon oath, acknowledged that he/she/it executed the within instrument for the purposes therein contained, and who further acknowledge that he/she/it is authorized to execute this interment on behalf of

Cooperative Strategies, LLC.

Ann Hoffsis

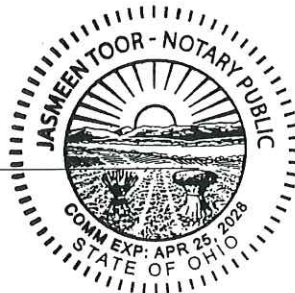
Signature

Witness by hand and Notaries seal at office this 27th day of June, year of 2023.

Jasmeen Toor Jasmeen Toor

Notary Public

My Commission Expires: 04/27/2028
T.T



CERTIFICATE OF NON-DISCRIMINATION

By submission of this Request for Qualifications, the contractor (NAME OF FIRM)

_____ Cooperative Strategies, LLC _____

certifies that he/she/it does not discriminate against any employee or applicant for employment on the grounds of race, age, color, national origin, religion, sex, disability, genetic information, or any other classification protected by federal, Tennessee state constitutional, or statutory law; and does not and will not maintain or provide for his/her/its employees any segregated facilities at any of his/her/its establishments; and, further, that he/she/it does not and will not permit his/her/its employees to perform their services at any location under his/her/its contract where segregated facilities are maintained.

_____ Cooperative Strategies, LLC _____

CONTRACTOR'S NAME

Ann Hoffsis

SIGNATURE

_____ June 27, 2023 _____

DATE

_____ Ann Hoffsis, Chief Operating Officer _____

Printed or Typed Name of Individual Signing for the Contractor

REQUEST FOR QUALIFICATIONS AGREEMENT

In compliance with the Request for Proposals, in consideration of the detailed description attached hereto; and subject to all conditions thereof, the undersigned agrees, if this Request for Proposals be accepted, to furnish any or all services upon which prices have been quoted in accordance with the specifications applying at the price set opposite each item. The undersigned further agrees, if awarded an order or contract, to protect, defend and hold harmless the Town of Greeneville and Greeneville City Schools from any suits or demands for payment that may be brought against it for the use of any product or article that becomes a part of an order or contract, and further agrees to indemnify and hold harmless the Town of Greeneville and Greeneville City Schools from any suits or actions of every nature and description brought against it for, or on account of, any injuries or damages received or sustained by any party or parties, or his servants or agents in the course of fulfilling the terms of the contract and/or Request for Proposals.

Cooperative Strategies

Name of Firm

4675 Lakehurst Court

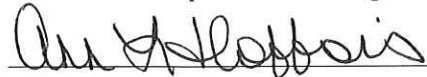
Address

Dublin, OH 43016

City State Zip

Ann Hoffsis, REFP / Chief Operating Officer

Authorized Representative Signature



Terms

614-526-3067

Phone Fax Number

ahoffsis@coopstrategies.com

E-Mail Address

June 27, 2023

Date