

February 3, 2014

Bryant Nodine
Program Manager, Planning Services
Tucson Unified School District
2025 East Winsett Street
Tucson, AZ 85719

Re: **Professional Services for TUSD School Master Plan (SMP) 2014
Strategic Boundary Review – Phase I**

Dear Bryant:

DLR Group is pleased to provide you this proposal to work with Tucson Unified School District on the Boundary Review Process. We are looking forward to working with you, the Administrative team and Demographic consultant, the Board and your community on this very important project to propose and evaluate various boundary scenarios that will support the District goals and Unitary Status Plan.

Boundary Review Approach

Our proposal is tailored to meet the tasks and timeline identified in your scope of services and conference call discussions this week. DLR Group will facilitate and manage the meeting process with the internal Advisory/Leadership Team and the external public Boundary Committees; coordinate with the demographic consultant on the boundary plan options, evaluations and requirements of the Special Master and Plaintiff.

Advisory & Leadership Team (February thru June)

The District has procured and will provide the Draft Magnet Plan, Demographic Study, Enrollment Projections, and Marketing Study, Efficiency and Curriculum Audits.

- Communication Plan/Kick-off Meeting (start 3rd Week February) (1 meeting)
Meet with key staff to go over the scope, process and schedule with the primary purpose of developing the communication plan
- Potential Boundary Plan Options and Issues (3rd Week February) (1 meeting)
Facilitating Scenario Workshops (DLR Led)
Educational Goals & Objectives, Operational Goals & Objectives
Community Goals & Objectives, Evaluation Criteria
Facilitating Boundary Plan Options and Issues Workshop (Demographer Led)
Demographer led exploration of District Grade Level Models, Magnet Center, Feeder Systems/Boundary Considerations and Capacity Objectives
- Boundary Plan Scenario Development (1st Week March) (1 meeting)
Collaboration with District Administration
Take to Advisory Team and SM&P
Collaboration with Demographic consultant

- Select Boundary Plan Options (April) (2 meetings)
Collaboration with Demographic consultant and Advisory/Leadership Team
- Revise Boundary Plan Options (April) (1 meeting)
Collaboration with Demographic consultant and Advisory/Leadership Team
- Implementation Plan of Phase I (May thru June 19nd)
The implementation plan should include implementation of phase 2 to the extent we've identified future boundaries, closures, facility needs.
- Confirmation and Presentation of Implementation Plan with Advisory/Leadership
(2nd Week of June) (Optional meeting)

Boundary Committee (March thru May)

The District will organize the public meetings and the project team will facilitate the discussion. The goal is to engage the community, give all patrons an opportunity to share their opinions and allow transparency of the process.

- Form Boundary Committee (3rd Week of February) (Coordination conference call)
District organized and coordinated with consultant team
- Regional Boundary Committee Workshop Meeting (1st Week of March) (1 meeting)
State of the District, Role of the Boundary Committee, Our Vision / Community Vision
Coordinate agenda with District and Demographer
- Review Potential Options (4th Week of March) (1 meeting)
Provide homework for next meeting
- Revise Options (1st Week of April) (1 meeting)
Complete options and prepare for public meeting
- Final Options (1st Week of April) (1 meeting)
Collaboration with Demographic consultant and Advisory/Leadership Team
Facilitate public meeting
- Review Draft Plan (Optional meeting or inform via email)
- Revise Draft Plan (Optional meeting, depends on changes made by Board)

Public

- Disseminate and Solicit Interest (3rd Week of February) (optional 1-2 meetings)
Via Traditional and Social Media avenues, SCPC, schools, press releases
- Regional Meetings (April) (3-4 meetings)
Boundary Committee members attend at least one, preferably all. Go over options and solicit feedback.

Special Master and Plaintiff's (February thru June)

- Plaintiff and Special Master will participate in a number of ways such as consultant meetings (1 meeting, 1 optional meeting, 1-2 conference calls)

Governing Board (February/July)

- Approve Consultants and Process (1st Week of February) (Administrative task)
- Approve Objectives and Criteria (2nd Week of March) (1 optional meeting)
Or, move forward with the objectives and criteria in JC-R.
- Approve Draft Plan (4th Week of May)
- Approve Final Plan (4th Week of June)
- Approve Implementation Plan with Phase II (2nd Week of July)

Communication Plan (February/July)

Work with District to promote and encourage community participation.

- Refine plan for facilitating public meetings
- Community Surveys: Provide recommendations and coordinate with District
Master Plan Website: District hosted, DLR populated/electronic coordination
Social Media: District hosted, DLR populated/electronic coordination
Documents Distribution: District provided via students
News Articles/Press Releases: District function
- Inform and Consult: Distribution of information
- Involve and Collaborate: Develop strategies to gather information
- Report and Close: Documentation of the process

Deliverables

Deliverables to Advisory & Leadership Team

Boundary Plan Scenario Overview Report DRAFT – Information integrated into one document from Draft Magnet Plan, Demographic Study, Enrollment Projections, Marketing Study and Efficiency & Curriculum Audits defined by Leadership’s Goals and Objectives for the Boundary Review. These initial documents will be provided to DLR Group from the Demographer and the District Staff as noted in the TUSD Boundary Review Process Document. This document will be used to facilitate the initial Kickoff Meeting with the Advisory & Leadership Team and the following Workshop meetings to evaluate scenarios and prioritize best options to share with the community.

Process Document and Communication Plan – This will be the guiding document highlighting action steps, involvement of team members and methods of communicating the boundary plan and process to the community. This document will be shared with the Special Master and Plaintiffs.

Meeting Minutes and Action Plans - All meetings will be documented and Meeting Minutes with Action Plans recorded and distributed to the Team.

Deliverables to Boundary Committee

Scenario Options Graphics – Graphics will be created and presented during Public Meetings for feedback in identifying community preferences and include a summary analyses with ethnic impacts; use format based on earlier SMPs.

Community Survey Questions – Prepared both as hard-copy handout and on Electronic Audience Response System presented during Boundary Committee Meetings.

Draft Boundary Review Recommendation – This is the compilation of the Boundary Committee feedback which will then be presented to the Advisory and Leadership Team to discuss final revisions to the scenarios.

Deliverables to Special Master and Plaintiffs

Process Document and Communication Plan – This overview document will advise the Special Master and Plaintiffs of the action to be taken leading up to final Board Approval

Scenario Options Graphics and Report – Present the development and preliminary evaluation of scenarios.

Final Boundary Plan Document – Following Board approval, this will be delivered as a Final with recommendations on Boundary recommendation in an effort to increase the integration and efficient use of its schools and properties. (All boundary-related documents and data will be completed by Applied Economics)

Communication Plan – Deliverables

Process and Community Plan Document – This will outline the steps and delivery dates of all materials throughout each stage of the Strategic Boundary Review Process

Boundary Scenario Graphics - for public meetings

Community Surveys - for Public Meetings in written and electronic format

Deliverables to Governing Board

Draft Boundary Review Document – This will be the approved document used to develop the Final Plan through compilation of Boundary Recommendation, Magnet Plan and District Strategic Plan. (All boundary-related documents and data will be completed by Applied Economics)

Master Plan Implementation Plan – Final plan created for next phase of action to execute the Boundary Plan recommendations. (All boundary-related documents and data will be completed by Applied Economics)

In summary our anticipated order of magnitude for the scope outlined in the above referenced exhibits is as follows:

\$ 78,880	Exhibit B – TUSD School Master Plan (SMP) 2014 Phase I Fee Matrix
<u>\$ 7,200</u>	<u>Exhibit C – TUSD Work Plan and Travel Expense Matrix</u>
\$ 86,080	Anticipated order of magnitude for referenced scope of work

Our firm is very excited to join your District and support your vision in the planning process!

Sincerely,
DLR Group



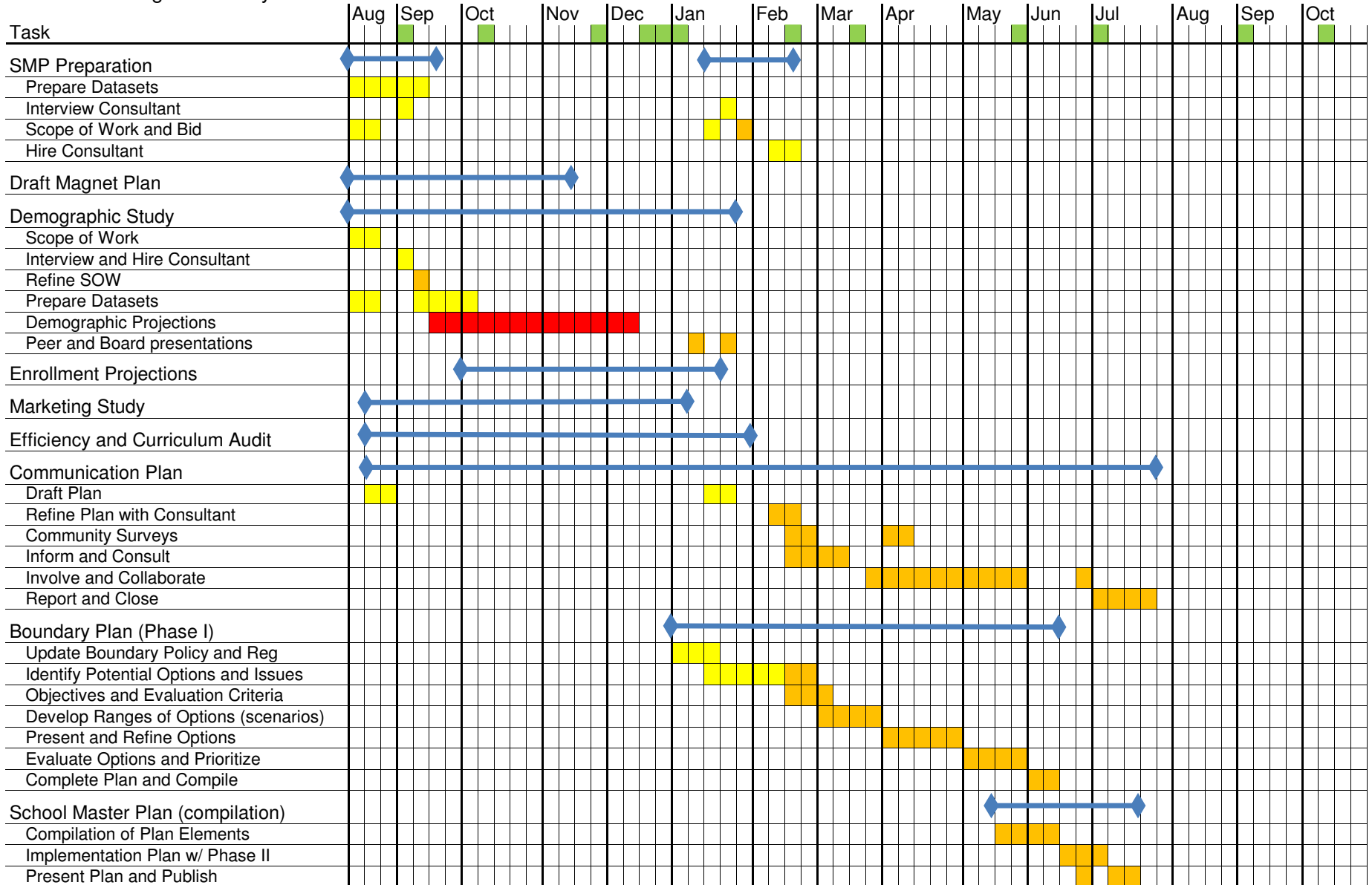
Susan Gray, AIA, LEED AP
Principal

Encl: Exhibit A – TUSD School Master Plan (SMP) 2014 Phase I Schedule
Exhibit B – TUSD School Master Plan (SMP) 2014 Phase I Fee Matrix
Exhibit C – Work Plan and Travel Expense matrix

cc: Tom O'Neil, DLR Group

TUSD School Master Plan (SMP) 2014 Phase I - Strategic Boundary Review

Phase I - Strategic Boundary Review



TUSD School Master Plan (SMP) 2014 Phase I - Strategic Boundary Review

Phase I - Strategic Boundary Review

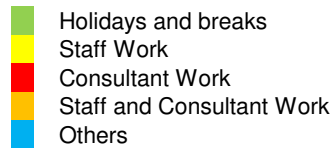
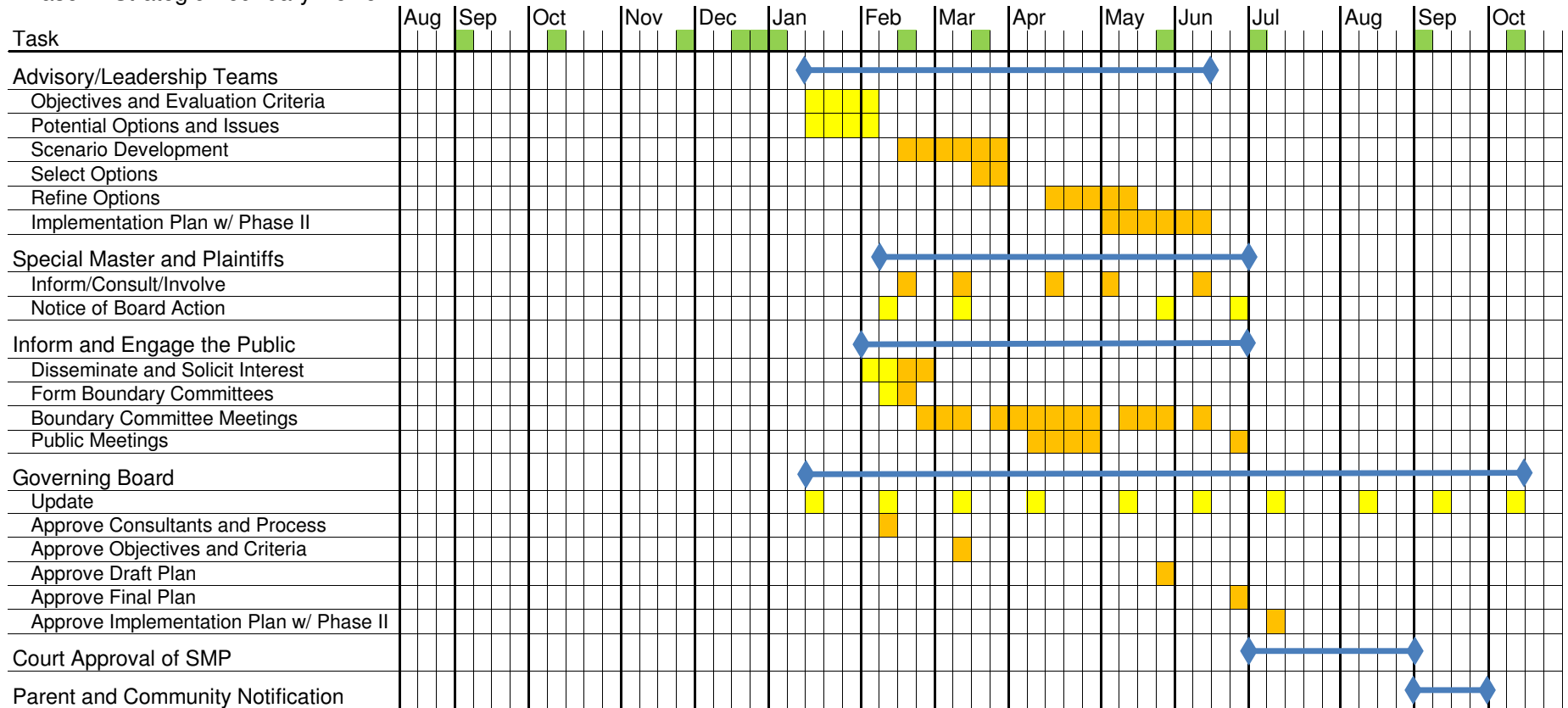


Exhibit B

DLR Group Fee Matrix for TUSD School Master Plan (SMP) 2014 Phase I - Strategic Boundary Review

	TUCSON UNIFIED SCHOOL DISTRICT	APPLIED ECONOMICS	SENIOR EXPERTS: Tom O'Neil, Brad Kiehl	DISCIPLINE LEADERS: Steam Gray	PROFESSIONAL SOCIAL MEDIA SPECIALIST: Penny Ramsay	PROFESSIONAL SUPPORT : Kathrina Leach	SENIOR EXPERT 21st CENTURY LEARNING SPECIALIST: Jim French	SENIOR EXPERT COMMUNITY OUTREACH SPECIALIST: Andrea Collier-Gehring	PROFESSIONAL SUPPORT : COMMUNITY OUTREACH TEAM MEMBERS	TOTAL	Comments
TUSD Boundary Review			\$250	\$200	\$110	\$85	\$250	\$250	\$85		
February 2014 - July 2014											
TOTAL - BASIC SERVICES											
Hours			102	168	16	212	0	0	0	498	
Costs			\$25,500	\$33,600	\$1,760	\$18,020	\$0	\$0	\$0	\$78,880	
SMP Preparation											
Demographic Study											
Scope of Work	X										
Interview and Hire Consultant	X										
Refine SOW (1 wk)	X										
Prepare Datasets	X										
Demographic Projections		X									
Peer and Board Presentations		X									
Enrollment Projections		X									
hours			0	0	0	0	0	0	0	0	
subtotal Demographic Study costs			\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Draft Magnet Plan	X										Provided by District
Marketing Study	X										Provided by District
Efficiency and Curriculum Audit	X										Provided by District
Communication Plan (February - July 2014)											
Draft Plan	X										Provided by TUSD
Refine Plan with Consultant (2 wk)	X		2	2							Coord w/TUSD on comm strategies for BC
Community Surveys (4 wk)	X		2	2	8	8					Coord w/TUSD on traditional paper media and social media strategies for BC feedback
Inform and Consult (4 wk)	X										Addressed Inform and Engage the Public
Involve and Collaborate (11 wk)	X	X									Addressed Inform and Engage the Public
Report and Close (4 wk)	X	X	2	8		16					Document Regional & BC mtgs (total of 4 mtgs)
hours			6	12	8	24	0	0	0	50	
subtotal Communication Plan costs			\$1,500	\$2,400	\$880	\$2,040	\$0	\$0	\$0	\$6,820	
Boundary Plan (Phase I) (February - July 2014)											
Update Boundary Policy and Reg	X										TUSD Provided.
Identify Potential Options and Issues (2 wk)	X	X	4	8		8					
Objectives and Evaluation Criteria (3 wk)	X	X	4	8		8					Coordinate with TUSD and Applied Economics
Develop Ranges of Options (scenarios) (4 wk)	X	X	4	8		8					TUSD provided, Consultant evaluated, coordinate with Applied Economics, recommendations provided
Present and Refine Options (5 wk)	X	X	2	4		8					Applied Economics led
Evaluate Options and Prioritize (4 wk)	X	X	2	2		4					Applied Economics led
Complete Plan and Report (2 wk)	X	X									Applied Economics Deliverable
hours			16	30	0	36	0	0	0	82	4 meetings
subtotal Boundary Plan (opt consolidation) costs			\$4,000	\$6,000	\$0	\$3,060	\$0	\$0	\$0	\$13,060	
School Master Plan (compilation)											
Compilation of Plan Elements (4 wk)											TUSD provided
Implementation Plan with Phase II (3 wk)			4	8		16					Consultant evaluated
Present Plan and Publish (3 wk)			4	16		20					
hours			8	24	0	36	0	0	0	68	
subtotal School Master Plan (compilation) costs			\$2,000	\$4,800	\$0	\$3,060	\$0	\$0	\$0	\$9,860	
Advisory and Leadership Teams											
Objectives and Evaluation Criteria	X	X									TUSD Provided
Potential Options and Issues	X	X									TUSD Provided
Scenario Development (6 wk)	X	X	8	8		8					
Select Options (2 wk)	X	X	8	16		16					
Refine Options (5 wk)	X	X	8	16		16					
Implementation Plan w/ Phase II (6 wk)	X	X	8	8		8					
hours			32	48	0	48	0	0	0	128	6 meetings
subtotal Advisory and Leadership Teams costs			\$8,000	\$9,600	\$0	\$4,080	\$0	\$0	\$0	\$21,680	
Special Master and Plaintiffs											
Inform / Consult / Involve	X		4	8		8					
Notice of Board Action	X										
hours			4	8	0	8	0	0	0	20	
subtotal Special Master and Plaintiffs costs			\$1,000	\$1,600	\$0	\$680	\$0	\$0	\$0	\$3,280	
Inform and Engage the Public											
Disseminate and Solicit Interest (2 wk)	X		2	2	8						Social Media support
Form Boundary Committee (1 wk)	X		2	4							Review TUSD recommendation
Public Meetings (5 wk)	X	X	16	20		30					Facilitate one large Regional meeting - Planning and Prep included
Boundary Committee Mtg (13 wk)	X	X	16	20		30					Facilitate three Boundary Committee meetings - Planning and Prep included
hours			36	46	8	60	0	0	0	150	4 meetings
subtotal Inform and Engage the Public costs			\$9,000	\$9,200	\$880	\$5,100	\$0	\$0	\$0	\$24,180	
Governing Board											
Update	X										Meeting and Prep time
Approve Consultants and Process (1 wk)	X										
Approve Objectives and Criteria (1 wk)	X										
Approve Draft Plan (1 wk)	X										
Approve Final Plan (1 wk)	X										
Approve Implementation Plan w / Phase II (1 wk)	X										
hours			0	0	0	0	0	0	0	0	
subtotal Governing Board costs			\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Court Approval of SMP	X										
Parent and Community Notification	X										

Work Plan and Travel Expense Matrix

2014																			
Travel Expense	unit cost	February		\$	March		\$	April		\$	May		\$	June		\$	July		\$
Airfare: Overland Park KS to Phx	\$300		1	\$300	1	1	\$600	1	1	\$600	1	1	\$300	1	1	\$300	1	1	\$300
Car Rental & Fuel / Day	\$110		1	\$220	1	1	\$330	1	1	\$330	1	1	\$330	1	1	\$220	1	1	\$220
Hotel Accommodation/Night (Phx)	\$135		1	\$135	1	1	\$270	1	1	\$270	1	1	\$135	1	1	\$135	1	1	\$135
Hotel Accommodation/Night (Tucson)	\$180			\$0			\$0			\$0			\$0			\$0			\$0
Meals - Per Diem (based on GSA)	\$45		4	\$270	4	2	\$450	4	2	\$450	2	4	\$360	4	2	\$270	2	4	\$270
Total Anticipated Travel Costs	\$7,200			\$925			\$1,650			\$1,650			\$1,125			\$925			\$925

Other Standard Reimbursables will be outlined on an attached form

TASK	2014						Comments
	February	March	April	May	June	July	
Boundary Plan (optional consolidation)							
Identify Potential Options and Issues (2 weeks)	X cc						cc = conference calls o = travel included in other task X = Tucson Meeting
Objectives and Evaluation Criteria (3 weeks)	o cc	o					
Develop Ranges of Options (scenarios) (4 weeks)							
Present and Refine Options (5 wk)							
Evaluate Options and Prioritize (4 week)				o			
Complete Plan and Report (2 week)					o		
School Master Plan (compilation)							
Compilation of Plan Elements (4 wk)							
Implementation Plan with Phase II (3 wk)						o	
Present Plan and Publish (3 wk)						cc o X	
Advisory and Leadership Teams							
Scenario Development (7 weeks)	o X	X X					
Select Options (3 weeks)			x				
Refine Options (3 weeks)			X X X				
Implementation Plan w/ Phase II (6 wk)				o		o	
Special Master and Plaintiffs							
Inform / Consult / Involve	o	o	o	X	o		
Inform and Engage the Public							
Disseminate and Solicit Interest (2 wk)	o cc						
Form Boundary Committee (1 wk)	o						
Public Meetings (5 wk)						o	
Boundary Committee Mtg (13 wk)	cc	cc o	X X	X	X		
Governing Board							
Approve Consultant and Process (1 wk)							
Approve Objectives and Criteria (1 wk)		X					
Approve Draft Plan (1 wk)				X			
Approve Final Plan (1 wk)						X	
Approve Implementation Plan w/ Phase II (1 wk)							X