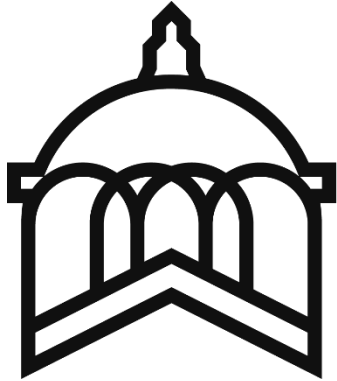


Pennridge School District Updated Enrollment Projections



PENNSYLVANIA ECONOMY LEAGUE

Submitted by:

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A Proposal to Provide an Updated Comprehensive Analysis of Demographics, Housing and Related Activities, and Other Relevant Factors and Generate Aggregate Districtwide Projections of K-12 Enrollments in the Pennridge School District

I. PURPOSE

The purpose of this proposal is to define the study's objectives and the scope of services to be provided by the Pennsylvania Economy League, Central PA, LLC, to the Pennridge School District relative to an updated comprehensive analysis of demographics, housing and related activities, and other relevant factors and the projections of aggregate districtwide K-12 enrollments in the district, and the terms and conditions under which they would be provided.

II. OBJECTIVE

The objective of the proposed study is to determine the future patterns of K-12 enrollments in Pennridge with a view to providing a base of reliable data for use by administrators, board members, and the public in making important decisions regarding the district's future classroom, staffing, program, and operational needs.

III. SCOPE OF SERVICES

The Pennsylvania Economy League will perform the following:

- A. Update population trends, birth patterns, migration patterns, the proportion of children involved in non-district schools and educational program (or example, private/parochial schools, home schooling, charter schools, cyber schools, full-time area career and technical centers, full-time Intermediate Unit programs, state owned schools, full-time consortium-operated alternative schools, juvenile correctional facilities, etc...), and historical K-12 enrollment trends.
- B. Update housing and related activities including the annual number of building and/or occupancy permits issued for new and/or rehabilitated housing units during the recent past; new housing developments and related activity recently completed and underway or planned; turnover in existing housing; the relationship of children to housing units; the amount of undeveloped land available in the district; infrastructure considerations; and other factors capable of influencing growth.
- C. To the extent possible, update and organize data on planned dwelling unit construction or real estate trends by various attendance areas in order to give the district a clear indication of where planned new housing unit activity—by number and by type—will be concentrated over the next several years. Similarly, population and birth data will be presented for the district.

- D. Provide updated aggregate districtwide K-12 enrollment projections by grade and current grade alignment for the next 10 years. These projections will incorporate the recent experience in the district with respect to cohort survival rates and pupil progression and will be strongly influenced by the various demographics, birth, housing, and related information that will be analyzed as part of Work Items A and B.
- E. If data is available, provide updated K-12 enrollment projections by sending areas by grade and current grade alignment for the next 10 years. These projections will incorporate the recent experience in the district with respect to cohort survival rates and pupil progression and will be strongly influenced by the various demographics, birth, housing, and related information that will be analyzed as part of Work Items A and B.

IV. DELIVERABLES

PEL will provide a one-page update to enrollment projections every 2-3 years, as requested by the school district. In addition, PEL will provide detailed an Excel book detailing all updated projections. PEL will make itself available for a public meeting/presentation on the substance of the updated projections.

V. DATA TO BE FURNISHED TO PEL

All information, data, reports, records, and other documents necessary for carrying out the above items of work are to be furnished to PEL without charge by the district and/or its agent(s). A full data request will be provided upon acceptance of the proposal. If essential information cannot be provided to PEL by the district within 30 days of the project initiation date, the timetable may have to be altered accordingly. Similarly, failure of the district, its agents, or its municipalities to provide all data requested may preclude PEL from completing all phases of this project as proposed. Any charges to PEL by third parties for services or materials deemed necessary for the successful completion of this examination will be passed through to the Pennridge School District—provided PEL receives the prior written approval of the district.

VI. COOPERATION OF BOARD, STAFF, AND/OR AGENT(S)

It is understood that the successful completion of the study in the time proposed herein will require the full cooperation of the board, its staff, and/or its agent(s), and representatives of the district's member municipalities, and others whose data and judgments are needed, and that such cooperation will be provided to PEL. To help ensure this cooperation, when necessary and required, the district agrees to send a letter of introduction to appropriate representatives, such as the district's member municipalities, within two weeks of the initiation of the project and to provide PEL with the names, phone numbers, and addresses of appropriate individuals in order to facilitate interviews via Zoom or teleconference. If in-person meetings are required, reasonable travel costs will be invoiced separately, with receipts and documentation provided.

VII. COMPENSATION

PEL's charges for its services shall be \$175 per hour commencing upon approval of this proposal through a final determination by the Pennridge School District. The Consultant shall be reimbursed for mileage and reasonable out-of-pocket costs associated with any travel and related expenses. Payments to PEL shall be made monthly upon submission by PEL of invoices to Pennridge School District.

*PEL reserves the right to negotiate for additional compensation if it is necessary to address unknowns that might require additional expertise and/or analysis beyond the Scope of Work outlined in this proposal. Any additional compensation must be in writing and approved in advance by the Board of School Directors as an amendment to this Agreement.

VIII. THE ORGANIZATION AND ITS STAFF

The Pennsylvania Economy League has been in the business of assisting state and local government officials and the general public in Pennsylvania since 1936. PEL is an independent nonprofit corporation, organized to achieve more effective and economical state and local government in Pennsylvania. To accomplish its purpose, PEL conducts research and analyses and provides technical assistance involving government programs, organization, management, and financing, and makes the results available to both public officials and citizens to aid them in arriving at informed and intelligent public policy decisions.

PEL staff members Lynne Shedlock and Patty Moorhead will be primarily involved in the project under the direction of Executive Director Vinny Cannizzaro. The profiles of key personnel are attached. Other staff may also assist at the direction of the Executive Director.

PEL is an independent contractor and not an employee, agent, or officer of the District. PEL's personnel are PEL's employees, and PEL is solely responsible for their wages, payroll taxes, benefits, workers' compensation, training, and supervision.

PEL may not assign this Agreement or subcontract any part of the Services without the District's prior written consent.

IX. TERMINATION

Either Party may terminate this Agreement for convenience upon thirty (30) days' written notice to the other Party. Either Party may terminate this Agreement for material breach if the breach is not cured within seven (7) days after written notice describing the breach. Upon termination or expiration, the District will pay PEL for Services properly performed through the effective date of termination.

X. WITHDRAWAL OF PROPOSAL

PEL reserves the right to withdraw this proposal if it is not favorably acted upon by the

district within 60 days.

XI. MISCELLANEOUS TERMS

This Agreement is governed by the laws of the Commonwealth of Pennsylvania. Any action arising under this Agreement will be brought in the Court of Common Pleas of Bucks County, Pennsylvania. This Agreement is the entire agreement of the Parties regarding its subject matter and supersedes all prior proposals, negotiations, and understandings. If any provision is found unenforceable, the remaining provisions remain in effect. A Party's failure to enforce any provision is not a waiver of that provision or of any later breach. This Agreement may be signed in counterparts and by electronic signature, each of which is an original and all of which together are one agreement. This Agreement is subject to approval by the District's Board of School Directors.

XII. MODIFICATIONS

This agreement can be modified only with the written approval of both parties.

_____ We Concur With This Proposal As Submitted

Signed for the Pennridge School District: _____

Title: _____

Date: _____

Signed for the Pennsylvania Economy League: _____

Title: _____

Date: _____

School District Proposal Biographies

Vinny Cannizzaro, Ph.D., MPP, PEL Executive Director

Vinny, PEL's executive director, has a broad research background in local government public policy. His work resulted in a new residential tax to support open space preservation in York County and was instrumental in the creation of new roles in state government to support the outdoor economy. Cannizzaro has also researched affordable housing, gun violence, homelessness and local government decision making. Prior to PEL, Vinny partnered with state and local elected officials, nonprofit organizations, and the business community to develop data-driven research, analysis, and policy development.

Vinny earned a Ph.D. in public policy from the University of Maryland, Baltimore County, a Master of Public Policy from the Johns Hopkins Bloomberg School of Public Health, and a Bachelor of Arts in political science from the University of Central Florida. Vinny is a 2025 honoree of City and State PA's 40 under 40 and Central Penn Business Journal's 40 under 40.

Lynne Shedlock, PEL Director of Operations

Lynne, PEL's Director of Operations, has broad experience with local governments across Pennsylvania. Under the STMP program, Lynne is responsible for project management, qualitative research, and management interviews, as well as developing the recommendations and five-year strategy for municipalities. She also has experience in municipal merger and consolidation, home rule charter development, and economic development strategies.

Prior to PEL, Lynne served as communications director for Lackawanna County, where she was press secretary, handled all facets of county marketing and communications, and served as a representative of the Commissioners' Office. She also worked for 20 years as a municipal government and education reporter, receiving several statewide and national awards for her reporting. Lynne earned a BS in journalism from Syracuse University and a certificate from Penn State Harrisburg in economic development. She is a member of the Pennsylvania Economic Development Association, and secretary and board member of Scranton Tomorrow, a volunteer economic and community development organization.

Patricia Moorhead, PEL Director of Financial Data and Analytics

Patty, PEL's Director of Financial Data and Analytics, conducts research and provides advisory services on municipal management, budgeting, and finance; capital budgeting and planning; personnel and labor relations; home rule; and related matters. Under the STMP program, Patty analyzes historical financial trends and prepares fiscal forecasts for municipalities throughout Pennsylvania. As part of these duties, she works with municipal officials to collect historical data on municipalities, reviews contract specifics to determine the future costs of current and past negotiations and consults with experts including lawyers and accountants to determine the feasibility of various municipal financial options and opportunities.

Prior to PEL, Patty held various positions including senior marketing analyst, general accounting/tax supervisor, budget administrator, and assistant general accountant. Her duties included: marketing, customer segmentation, sales targeting, and campaign tracking; finance, strategic planning, forecasting, and ROI modeling; and accounting, general ledger, accounts payable and tax issues. She earned a BS in accounting from Wilkes University, Wilkes-Barre. She has completed course work in the DCED School of Municipal Government and is a member of the Government Finance Officers Association.

Steve Jacob, Ph.D., PEL Director of Research Initiatives

Steve, PEL's Director of Research Initiatives, has extensive experience in community-based research projects. He is an expert in applied social research, rural sociology, and social indicators and metrics. Steve's work has resulted in significant policy implications and outcomes related to community-based initiatives and priorities, rural economic development, agricultural preservation, and fishery management.

Steve earned a Ph.D. and Master of Science in rural sociology from Penn State University, and Bachelor of Arts in sociology from Salisbury State University. He has authored or co-authored over 80 peer-reviewed academic papers, book chapters, and reports, as well as presented at over 40 academic conferences and invited workshops.