

# KENNEDY & COMPANY

PROPOSAL PREPARED FOR:

SANTA MONICA COLLEGE

*EDUCATIONAL MASTER PLAN  
PREPARATION SERVICES*

*February 14, 2023*



SANTA  
MONICA  
COLLEGE

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Santa Monica College

February 14, 2023

Dear Santa Monica Community College District RFQ Evaluation Committee,

On behalf of Kennedy & Company, we are pleased to present our proposal to you to develop an Educational Master Plan (EMP) for Santa Monica Community College District (SMCCD). I hope the following pages provide you with a clear sense of Kennedy & Company's expertise, values in serving higher education institutions, and pragmatic approach to partnering with you to identify the best solutions for your college. I believe, based on the experience of our consultants, and the similar work we have conducted for institutions like SMCCD, that we have the ideal expertise and insights to assist the College and District with their goals of improving efforts to forecast, recruit, enroll, retain, and graduate a student body in accordance with your mission and goals.

As you review our proposal, I hope you keep in mind the following goals that we set for each of our projects:

***Communicate with Clarity, Honesty, and Candor*** – We aim to present our analyses and recommendations in a way that is easily understood, (relatively) free of jargon, and direct in its manner.

***Collaborate with Respect*** – We understand that the best projects involve the client in active, ongoing communications so that, to the best of our ability, we reach conclusions and recommendations together.

***Demonstrate our Passion for Higher Education*** – We work exclusively with institutions of higher education, helping them to achieve their goals, maintain their missions, and face new challenges.

***Help the Institution to Achieve Results*** – We know that colleges don't need another report that gathers dust, but instead a practical blueprint for surviving and thriving. We push our clients to consider not only what to do but also how they can best execute on a new set of strategies.

*(continued on the following page)*

# KENNEDY & COMPANY

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## ***Our Expertise***


Kennedy & Company was founded to provide higher education institutions with a holistic approach to managing enrollments, improving university operations, enhancing student retention, implementing new technologies and methods of delivering education, and achieving financial sustainability. Through the work SMCCD has requested for the Educational Master Plan, we believe these components leverage our expertise in assisting universities with holistic long-term planning. Kennedy & Company's consulting professionals have worked with over 150 institutions on projects focused in this area and we would have provided multiple references institutions that have requested similar support within our proposal.

Our proposed team and approach to the work outlined herein are centered on data-based decision-making and qualitative investigation, making Kennedy & Company an excellent fit for the analysis and enrollment planning SMCCD is seeking. We have extensive expertise working with student-facing personnel in higher education institutions, especially in admissions, retention, and student services functions, enabling us to identify underlying causes not immediately evident in the data.

We look forward to the opportunity to share more with you about our experience and plan. Should you have any questions regarding this proposal, please do not hesitate to contact me at [dmcgee@kennedyandcompany.com](mailto:dmcgee@kennedyandcompany.com) or by phone at (404) 431-9888.

Kennedy & Company verifies that the individuals signing this cover letter are authorized to bind the company contractually. All addenda, forms, certificates and compliance requirements included in this RFP have been completed and are at the end of the proposal. This proposal is a firm and irrevocable offer, good for 180 days. We acknowledge that all documents submitted will become a matter of public record. We also acknowledge that Kennedy & Company is willing to perform all the services as described in the RFP, that the staff is available to perform all services and deliverables as described in the RFP and that under penalty of perjury under the laws of the State of California, the information in the proposals is true and correct.

Sincerely,



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Devon McGee  
Principal  
Kennedy & Company  
[dmcgee@kennedyandcompany.com](mailto:dmcgee@kennedyandcompany.com)



Kendra Grinnage  
Associate Principal  
Kennedy & Company  
[kgrinnage@kennedyandcompany.com](mailto:kgrinnage@kennedyandcompany.com)

RFQ# 010623SF

## Consultant Information

1. RESPONDENT LEGAL ENTITY NAME:

Kennedy & Company Education Strategies, LLC

S-Corporation

3. 10 years in business

4. RESPONDENT CONTACT PERSON:

Devon McGee, Principal

2000 P St NW Washington, DC 20037

(404) 431-9888

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Kendra Grinnage, Associate Principal

2000 P St NW Washington, DC 20037

(202) 455-8868

[kgrinnage@kennedyandcompany.com](mailto:kgrinnage@kennedyandcompany.com)

There have not been any changes in control or ownership of the company in the past three years.

5 – 7 None of Kennedy & Company or its consultants' licenses have been suspended or revoked. We have no pending or legal actions, disputes or allegations against the company.

# COMPANY BACKGROUND AND HISTORY

Kennedy & Company was founded in 2013 on the belief that exceptional and specialized higher education advisory services should be accessible to the full range of non-profit institutions who would benefit from them. As such, we have structured our services and pricing to enable us to serve every level of the non-profit higher education market. We have served community colleges and systems, large four-year public institutions, small private institutions that are dependent on tuition revenues, public colleges and systems, associations of public and private institutions, and every type of institution in between. We are headquartered in Washington, DC, with employees in Virginia, California, North Carolina, and Pennsylvania. Below is an illustrative list of our clients, including highlighted universities where our consultants have enrollment consulting experience.

## Kennedy & Company Client List - Enrollment Strategy\* Clients in Bold

<b>Agnes Scott College</b> <b>American University</b> <b>Auburn University</b> <b>Bay Path University</b> <b>Baylor University</b> <b>Black Hills State University</b> <b>Brigham Young University</b> <b>Brown University</b> <b>Butler County Community College</b> CAEL <b>Carlow University</b> <b>Cascadia</b> <b>Catholic University</b> <b>Clarion University</b> <b>Dallas International School</b> <b>Delaware County Community College</b> <b>Duke University</b> <b>East Tennessee State</b> <b>Emory University - Goizueta</b> <b>ESADE</b> <b>Fairleigh Dickinson University</b> <b>Fordham University</b> Furman University <b>Fuqua School of Business</b> <b>George Mason University</b> <b>George Washington University</b> <b>George Washington -School of Business</b> <b>Georgetown University</b> <b>Graduate Management Admission Council</b> <b>Gwynedd Mercy University</b> <b>Haas School of Business</b> <b>Hankamer School of Business</b>	<b>Harvard University</b> <b>Hawaii Pacific University</b> <b>Hood College</b> Houston Community College <b>Keene State College</b> LA Assoc of Independent Colleges <b>Laguna College of Art and Design</b> <b>Lansing Community College</b> <b>Lehigh Carbon Community College</b> Lone Star College <b>Longwood University</b> <b>Louisiana State University</b> Lumina Foundation <b>Middlebury College</b> <b>Montgomery College (MD)</b>  <b>Montgomery College Foundation</b> <b>Moore School of Business</b> <b>Mott Community College</b> <b>NC State University</b> <b>New York Chiropractic College</b> Ohio University <b>Old Dominion University</b> <b>Pennsylvania State University</b> <b>Rice University</b> <b>Rutgers University</b> <b>Saint Joseph's University</b>  <b>San Mateo CC District</b> <b>Santa Clara University</b>  <b>Santa Monica College</b> Seton Hall University <b>Seton Hall School of Law</b> <b>Skyline College</b> Southern University	<b>Spelman College</b> St. Martins The New School <b>The University of Pennsylvania</b> <b>Tulane University</b> <b>Tuskegee University</b> <b>Universities at Shady Grove</b> <b>University Of California Riverside</b> University of Louisiana System <b>University of Puget Sound</b> <b>University of San Francisco</b> <b>University of South Carolina</b> <b>USC - Palmetto College</b> <b>USC - Salkehatchie</b> <b>USC - School of Law</b>  <b>USC -Sumter</b> <b>USC - Lancaster</b> University of the District of Columbia <b>University of Toronto</b> <b>University of Washington</b> <b>Wharton School of Business</b> <b>Vanderbilt University</b> <b>Villanova University</b> <b>Virginia Commonwealth University</b> <b>Wayne State</b> <b>West Virginia University</b>  <b>Western Michigan University</b> <b>Wilfrid Laurier University</b>  <b>William &amp; Mary</b> <b>William Jessup University</b> <b>Winchester University</b> Wright State University
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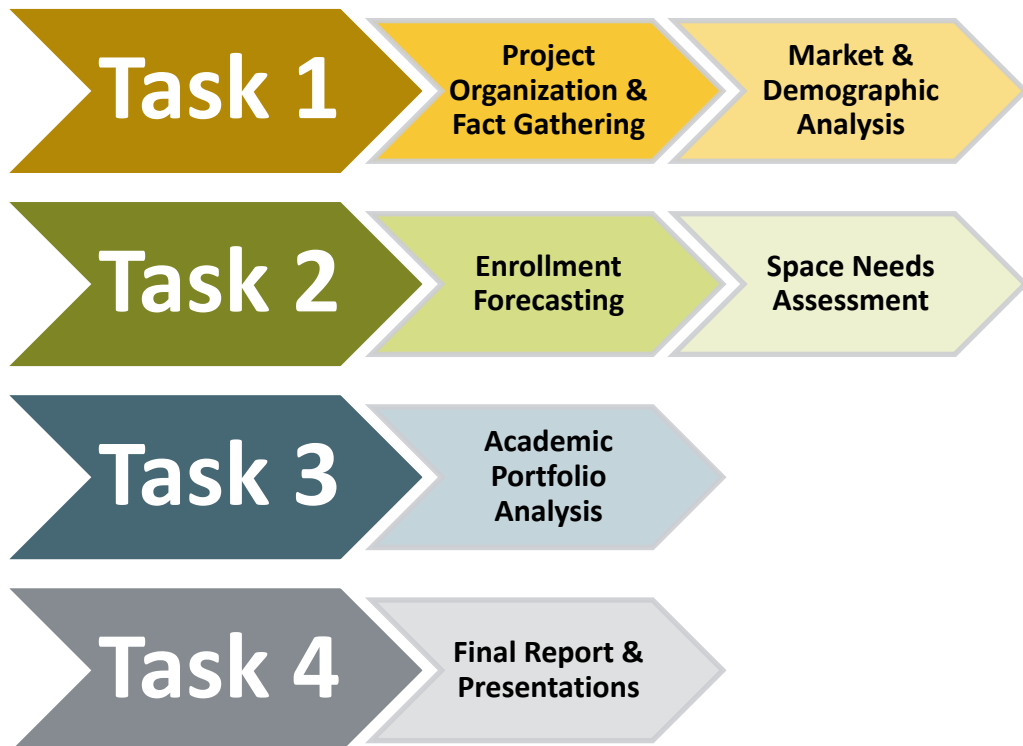
# OUR PROCESS

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Kennedy & Company utilizes a highly collaborative, multi-step approach to educational master planning (EMP). Our approach combines the insight and institutional knowledge of the team at Santa Monica College and SMCCD with Kennedy & Company's expertise in facilitation, market research, enrollment forecasting, space utilization and assessment, and academic portfolio analysis to translate strategy into actionable plans.

We will work with SMCCD to engage stakeholders from across Santa Monica College's several campuses in order to develop a forward-looking educational master plan. By conducting thorough assessments of the internal environment at each individual institution and the external factors driving change now and into the future, the resulting EMP will put SMCCD in a strong position to fulfill the District's strategic priorities and remain a catalyst for educational and economic prosperity into the next decade. This document will also serve as a solid foundation which the District can build upon when it pursues the development of an updated facilities master plan.

The process that Kennedy & Company will utilize in its collaborative work with SMCCD is outlined below:



# APPROACH – TASK I

## TASK 1: PROJECT ORGANIZATION & FACT GATHERING

**Goal:** *Implement and lead a course of action within the District’s collegial consultation processes to assess the current instructional programs and support services and to determine the need for future instructional programs and support services (CTE and transfer-oriented) to serve the community.*

### 1 Project Organization

In the first phase, we will work with SMCCD leadership to ensure that the EMP process adequately engages stakeholders to set up a partnership between SMCC, the College Working Groups and Kennedy & Company. A key element to project planning is aligning goals and expectations for the project and the approach amongst key stakeholders, project leaders, and sponsors. The project will engage a range of constituents through interviews and discussions with project leadership.

In partnership with project sponsors, master planning leadership, and any other key stakeholders, we will: (1) ensure our alignment on the goals and expectations for the project and a corresponding plan and timeline; (2) define a list of interviewees and/or focus groups, (3) identify key stakeholders and the best methods of engagement; and (4) develop a plan to communicate updates on the project as it progresses. This early alignment will ensure that the established process and eventual plan are reflective of the College community and the district’s participatory governance structure.

### 2 Fact Gathering & Document Review

During this phase, Kennedy & Company will work with the District to review documentation and identify key data sources that will be utilized throughout the development of the educational master plan including:

- Enrollment sources with which to determine the Weekly Student Contact Hours (WSCH) and Full Time Equivalent Students (FTES) generated by each unit/campus and by each department. Enrollment will be analyzed in a variety of ways to understand:
  - Enrollment by section (WSCH & FTES), participation rates (general and recent high school grads), FTE faculty load ratios, program completion and transfer rates, student support service levels
- Current planning documents such as:
  - Technology plans, human resources plans, equity plans, environmental scans, previous strategic plans and facilities master plans, among others

***Task 1 will include up to 20 meetings with SMCCD stakeholder groups. Additional meetings can be negotiated into the contract at an additional cost.***



# APPROACH TASK I

## TASK 1: MARKET & DEMOGRAPHIC ANALYSIS

Following the Project Organization and Fact Gathering stages, Kennedy & Company will develop a report of empirical data on the composition of the service areas proximate to SMCCD. We will collaborate with the District to gather relevant available data and use our market research skills project how SMCCD's service area and the surrounding areas proximate will grow or change in the next 5-10 years. Understanding how the shift of demographic, socioeconomic, educational, and pedagogical trends are changing will enable SMCCD to deliver scalable and flexible programming within its service area and regional recruiting markets. Our research will include, but not be limited to, the current status, recent historical trends, and projected future shifts amongst the prospective student population within the district:

- Demographics (e.g., age, sex, race, ethnicity, etc.)
- Income statistics broken down by ranges and key statistics
- Educational attainment
- Current employment industries and roles
- High school graduation trends
- Economic development indicators

This initial market research phase will also include a high-level scan of the academic programs currently available at District colleges in comparison to local peers to identify gaps / opportunities in current programming.

*Similar deliverables from past projects are outlined below:*

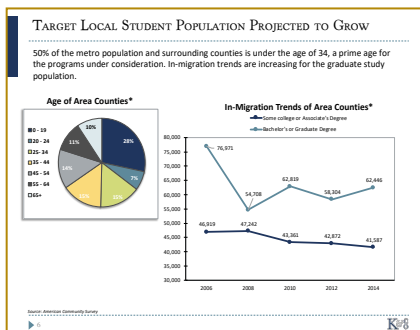


Image 1: Growth and migration trends of local area

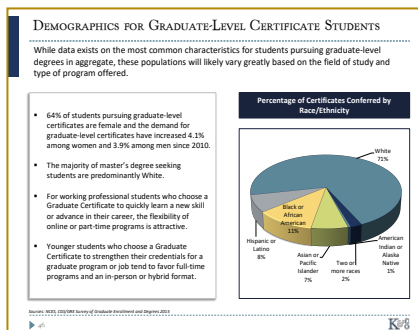


Image 2: Key demographics overview and snapshot

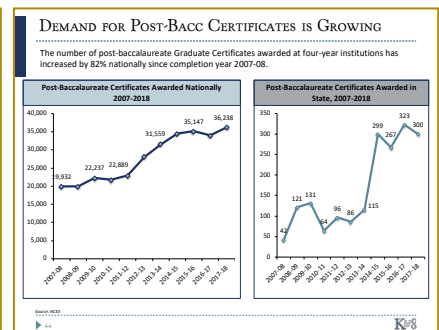


Image 3: Prospective student demand for academic programming

# APPROACH TASK I

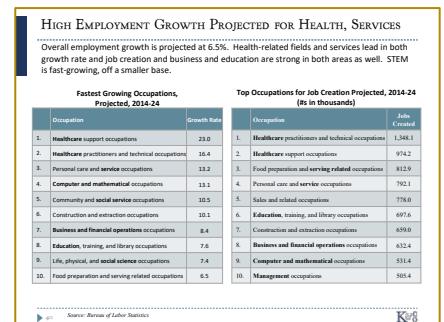
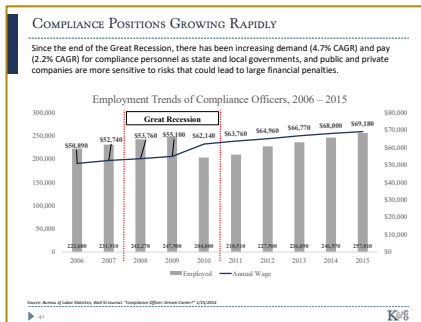
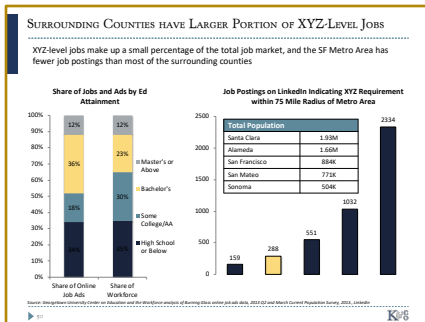
## TASK 1: MARKET & DEMOGRAPHIC ANALYSIS, CONT.

Kennedy & Company brings significant experience in working with community colleges and community college systems to ensure their academic programs that meet the needs of the local employment market. We will identify the current skills gaps within SMCCD's regional area and combine these insights together with our knowledge of innovative and unique models of delivery at other community colleges around the nation. These insights will provide SMCCD with a past, current, and future view of its district, the surrounding areas, and the types of programming that might appeal to its population. Specifically, Kennedy & Company will develop:

- Insights into employment market trends in the district where current and future opportunities lie
- An assessment of the corporations, agencies, and organizations hiring within the region, the specific skillsets that are in high-demand, and the skillsets that are projected to be in high demand in the future

Using our proprietary market research methods and tools, Kennedy & Company will identify the positions / titles, industries, accreditations, and technical / soft skills that local employers need, both now and in the future.

*Similar deliverables from past projects are outlined below:*



*Image 1: Education demands by job in surrounding counties*

*Image 2: National growth trends of compliance positions*

*Image 3: Rapidly growing occupations in national and local markets*

# APPROACH TASK 2

## TASK 2: ENROLLMENT FORECASTING

**Goal:** Create long range Educational Plan for the District through the year 2032/33. Identify the key planning elements and parameters for long-term development

Based on data from prior enrollment years, interviews with enrollment and admissions staff, demographic trends, and other empirical data points, Kennedy & Company will construct a dynamic enrollment model that forecasts the next five to ten years of enrollments and WSCH and FT using the population participation rate method. We will create a shareable Excel model that SMCCD can use in future years as well as a report highlighting our findings regarding previous few year’s enrollment trends, relevant changes to student populations, and highlights from interviews with leadership and staff.

### Core activities for the development of this model and forecast include:

- Interviews with enrollment leadership and staff to identify trends, intuitions, and other hypotheses that will shape both the enrollment forecast and the accompanying research performed by Kennedy & Co.
- Analysis of the prior 3-5 years of enrollment data and the development of a forward-looking 10-year enrollment projections model.
- Special analysis of the 2020-2021 year that was affected by Covid-19 to understand trends that have continued following the pandemic. This will include a review of the State Chancellors Office Long-Range Enrollment Forecast reports and any other supporting documentation.
- Where possible, we will take into consideration the transience levels within SMCCD’s service area and to/from outside the service area.
- Projections of future program of instruction and their cost structures at 5-year benchmark intervals; 2023/24 to 2027/28 and 2028/29 to 2033/33.
- Delivery of a final enrollment model that forecasts 5 – 10 years of enrollments by specific students type and by campus.

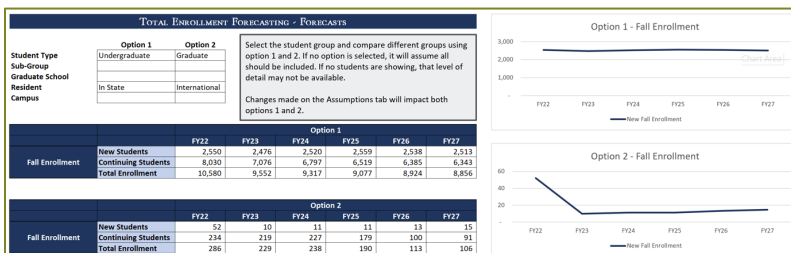


Image 1: Total enrollment forecasts differentiated by specific student populations

# APPROACH TASK 2

## TASK 2: SPACE NEEDS ASSESSMENT

Utilizing the enrollment forecasts developed through the prior portion of this task, Kennedy & Co will work to understand the implications that projected enrollment growth will have on the space needs of SMCCD.

Employing Kennedy & Company's enrollment forecast data, we will forecast a conversion of WSCH into Assignable Square Footage (ASF) to understand how much space the college / District will need to serve its students moving into the future. For academic spaces used for credit-generating activities such as classrooms, laboratories, and specialized art spaces (e.g., studios), Kennedy & Company will calculate the room and seat utilization of these areas to determine how much space is already available on campus. In many instances, low levels of classroom and/or seat utilization are due to scheduling policies and technology that do not optimize the current stock of academic spaces.

Without granular usage data, non-academic space such as offices, auxiliaries, athletics, research facilities, and libraries are difficult to measure using traditional utilization metrics than those used for instructional space. However, using industry benchmarks of functional space types normalized for total enrollments relative to peers, SMCCD can understand where its current space profile is either insufficient or above average. We will use best practice and benchmark data to determine how the current allocation of these functional spaces meets SMCCD's needs both now and in the future.

After gaining an understanding of how SMCC is currently utilizing its space in comparison to its projected space needs, K&Co will deliver a high-level report of SMCCD's current utilization of academic space and targets moving forward, as well as an overview of how the total amount of other functional space compares to industry benchmarks. These insights will help inform the space allocation and distribution by function in the Facilities Master Plan.

# APPROACH TASK 3

## TASK 3: ACADEMIC PORTFOLIO ANALYSIS

**Goal:** *Analyze instructional programs and services for the college across both CTE and transfer pathways.*

Building upon the findings from Tasks 1 and 2 that assess how future employer demands and demographic trends may impact the future program needs and overall enrollment forecasts, Kennedy & Company will work collaboratively with SMCC to specifically look at how its Career and Technical Education (CTE) programs and transfer pathways need to be adapted to meet future market needs. Central to this phase will be the consideration of SMCC's current transfer success and ensuring that all program considerations are viewed and developed through an equity lens and are in service of the district's broader equity and inclusion goals. At the conclusion of this phase, K&Co will develop a report outlining a recommended program of instruction for CTE and transfer program pathways and supporting services for the District.

***Core activities in this phase include conducting monthly meetings with EMP workgroups, admin, deans, and faculty to assess:***

- Current transfer program success and the alignment with market trends and employer demands, earnings potential, and alignment with the programs at CSUs and UCs
- Opportunities for future development of CTE and transfer program pathways focusing on:
  - Labor market trends
  - Planning and financial considerations of new program development
  - Opportunities to sunset, strengthen, or reconfigure current programs to better align with SMCCD goals

# APPROACH TASK 4

## TASK 4: FINAL REPORT & PRESENTATIONS

Kennedy & Company will synthesize its findings into a final presentation to be shared with the SMCCD leadership team. This presentation will include our interview themes and insights, market research & demographic analysis, enrollment forecasts, space needs assessment, academic portfolio analysis recommended program of instruction.

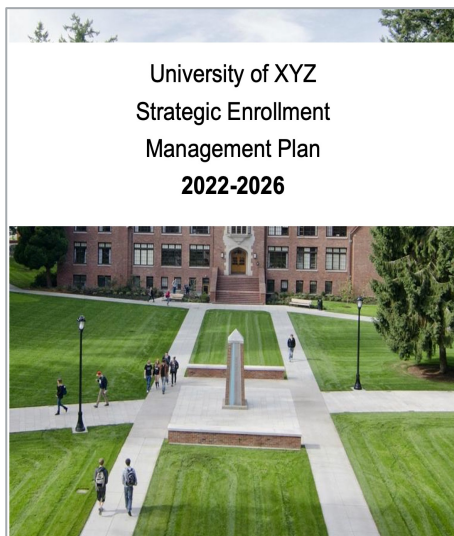
Following our final presentation to the SMCCD project team, we will make any requested changes or modifications to meet the needs of other approval groups. Our presentation will be shared with any and all groups as agreed upon during the project organization phase in Task 1.

### ***Specific work activities during this phase include:***

- Synthesizing all findings from previous phases into a single presentation highlighting the main themes, data, takeaways, and recommendations of the Educational Master Plan for SMCCD.

### ***Specific deliverables from this phase include:***

- A final presentation to the project team including key findings and recommendations leading to the SMCCD Educational Master Plan
- Additional presentations and meetings with other campus groups, as identified by the project team



### **Strategies and Action Plans**

The strategies and action plans outlined in the following section are synthesized from and inspired by a range of existing, new, and potential future work at the University of XYZ, such as:

- Strategic Plan: <https://www.xyz.edu/about-xyz-chiefs/leadership/strategic-plan>
- Diversity Strategic Plan: <https://www.xyz.edu/diversity-and-inclusion/quiet-sound/threshold-2022-cultivating-culture-industry-excellence>
- Strategic Enrollment Planning Steering Committee & Subcommittees
- Student Success Task Force
- Brand Messaging Committee
- Perspectives from President's Cabinet, Faculty, Staff, and the Enrollment Department

#### **List of recommendations**

1. Enrollment Organization and Competencies
  - a. Improve Enrollment marketing
  - b. Improve Enrollment analytics capabilities
  - c. Engage more university stakeholders in the enrollment process through a Constituency Engagement Plan
  - d. Improve International Recruitment Strategies
2. *Rethink Home State*
  - a. Reassign Counselor Territories and Geographical Areas of Focus
  - b. Improve Marketing & Communication
  - c. Launch a Branded In-State or Regional Financial Aid Strategy
3. Student Success, Wellbeing, and Retention
  - a. Launch First-year Success Coach Program
  - b. Student Success Task Force Recommendations
4. Inclusion, Diversity, Equity, and Access
  - a. Continue to implement strategies outlined in the Diversity Strategic Plan
  - b. Other IDEA Subcommittee initiatives
5. Graduate Education Development and Sustainability
  - a. Graduate Subcommittee recommendations
  - b. Develop 1-2 new graduate programs in areas of University strength and labor market demand and enhance connections between graduate and undergraduate programs
6. Transfer Pathways and Strategy
  - a. Enhance Focus and Commitment to Transfer Students via Subcommittee Recommendations
7. Technology & CRM Optimization
  - a. Launch a lifecycle CRM system for engaging with and tracking current students throughout their time at XYZ
  - b. Enhance the utilization of Slate and application of the system in marketing efforts
  - c. Improve self-service opportunities and document management in Financial Aid

# KENNEDY & COMPANY

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## Kennedy & Company Proposed Project Team



**Devon McGee (Principal)** assists higher education institutions with their operational and strategic initiatives, with an emphasis on resource optimization. Devon's experience includes work with large two- and four-year institutions. He specializes in strategic and analytical work related to finance and budget modeling, academic portfolio optimization, operational excellence, enrollment, space management and utilization, faculty capacity, technology system implementations, and strategic planning. Devon began working in higher education with Huron Consulting Group as a Strategy & Operations Associate prior to joining Kennedy & Company. He holds a BS in Finance and Economics from the University of South Carolina.



**Kendra Grinnage's (Associate Principal)** works with higher education institutions on various strategic initiatives including the development of online education strategy initiatives, strategic planning, academic portfolio strategy, student experience optimization and the development and implementation of diversity, equity, and inclusion initiatives. Additionally, she has significant experience in college counseling, K-12 admissions, student financial aid counseling, and residential student life programming. Kendra holds a BA in history and African American Studies from the University of Virginia and a MEd. in Higher Education from the University of Pennsylvania where her work predominantly focused on increasing equity and access for underrepresented students.



**Emily Murphy (Manager)** performs data analysis and process improvement for higher education institutions. Her prior experience includes four years in management consulting at KPMG. During this time, she specialized in finance processes, system implementations, and data management. Emily holds a B.S. in Accounting and Finance from Indiana University and an M.S. in Data Science from the University of Virginia.

*Kennedy & Company will also staff Associates or Analysts on this staff, as needs arise*

# PROJECT EXPERIENCE

<b>INSTITUTION:</b>	Chabot-Las Positas Community College District (CLPCCD)
<b>PROJECT SUMMARY:</b>	<p>Kennedy &amp; Company assisted Chabot-Las Positas Community College District conduct an equity-driven enrollment audit to assess how enrollment processes at the District’s two campuses, Chabot College and Las Positas College, could be improved to more equitably serve students and restore enrollments to historic levels.. Our work focused on reviewing the two colleges’ approaches to recruitment and enrollment, conversion practices, internal business processes and points of departure from those processes. K&amp;Co also conducted a thorough audit of the CLPCCD CRM systems in order to assess current strengths and opportunities for the colleges to better utilize technology in service of their enrollment goals. To conduct this analysis, we conducted over 25 hours of interviews with staff across both colleges to better understand the strengths, pain points and areas for opportunity in the colleges’ enrollment processes. These interviews were coupled with student focus groups and a comprehensive survey of current, former, and never enrolled students to better understand their applicant journey experience.</p> <p>In addition to this work, K&amp;Co conducted national and localized market research to contextualize the broader context in which CLPCCD was looking to impact enrollments. K&amp;Co also did a competitive analysis and secret shopping to assess how CLPCCD’s marketing, outreach, and student enrollment experience compared to peers. Our work culminated in a comprehensive suite of recommendations and a prioritized implementation plan for CLPCCD to make substantive improvements to the student enrollment experience, reduce barriers to entry, streamline internal processes, and better utilize their CRM and other technologies to support the District’s strategic goals. The District is now in process of beginning implementation of those recommendations.</p>
<b>CONTACT REFERENCE:</b>	<p><b>Ronald Gerhardt</b> Chancellor Chabot-Las Positas Community College District Phone: (925) 485-5217 Email: rgerhard@clpccd.org</p>



# PROJECT EXPERIENCE

<b>INSTITUTION:</b>	Montgomery College (MD)
<b>PROJECT SUMMARY:</b>	<p>Kennedy &amp; Company assisted Montgomery College with the academic and enrollment planning components a study to build a new physical campus of the community college in eastern Montgomery County. The proposed new campus was over 20 miles away from the other three campuses and was forecasted to recruit a different profile of student, which required analysis related to the enrollment strategy, academic program planning, and a forecast of the enrollments Montgomery College could expect in the next ten years. Our work focused on identifying projected changes in student demands, academic programs pursued, and best practices related to recruiting a diverse population of traditional and non-traditional students. To conduct this analysis, we interviewed nearly 40 faculty and staff members at Montgomery College to determine their goals and expectations for the changing enrollments in the recent past and coming years to provide input regarding the optimal space composition of the proposed new campus.</p> <p>In addition to enrollment strategy focusing on the operations and space needs within the enrollment function, one of the keys to our analysis was the consideration of non-academic needs outside of the classroom for students such as mental health / counseling resources, spaces for studying and group-work, community gathering areas, and recreational services. Kennedy &amp; Company benchmarked each of these components for Montgomery College relative to peers and helped the institution prioritize them as investments at the new campus. Our work ultimately supported a master plan and advocacy document that was shared with Montgomery County and Maryland political leaders to support the request for the new campus in eastern Montgomery County. The request is currently in process and is being vetted by elected officials at the state and county level.</p>
<b>CONTACT REFERENCE:</b>	<p><b>Stephen Cain, PhD</b> Chief of Staff / Chief Strategy Officer Montgomery College Phone: (240) 567-1796 Email: <a href="mailto:stephen.cain@montgomerycollege.edu">stephen.cain@montgomerycollege.edu</a></p>

# PROJECT EXPERIENCE

INSTITUTION:	Northern Virginia Community College (NOVA) & George Mason U.
PROJECT SUMMARY:	<p>Kennedy &amp; Company worked together with NOVA and George Mason University to provide analysis on the financial impacts of the ADVANCE partnership – a pathway program from the community college to the completion of a bachelor’s degree at Mason.</p> <p>As part of this work K&amp;Co. consultants assisted Mason and NOVA with the preliminary visioning of the operational model for ADVANCE, paying particular attention to the student flow, starting with the identification of prospective students all the way through graduation at Mason to ensure that the financial model accurately portrays the costs of running a frictionless enrollment environment. Kennedy &amp; Company also made “buy vs build” recommendations for how Mason and NOVA can best design the ADVANCE student recruitment and support infrastructure with internal resources and external partners.</p> <p>K&amp;Co. interviewed key stakeholders at both institutions to understand the unique structures of each and how that impacts planning for the ADVANCE partnership. We also developed a forecast for potential outsourcing and ISA costs applicable to the ADVANCE project. The primary deliverable for the project was a dynamic and iterative financial model built to project the revenues and costs to launch and sustain the ADVANCE program over the course of the next ten years. We also projected a baseline for enrollments, tuition rates, fees, course consumption, instructional modality, and financial aid to accurately reflect expected revenues, based on NOVA and Mason experience, where applicable and comparisons to other programs designed for similarly situated students. Finally, we forecasted faculty, student support, technology, and administrative costs that Mason and NOVA can expect to effectively support ADVANCE and its students.</p>
CONTACT REFERENCE:	<p><b>David Burge</b> Vice President for Enrollment Management George Mason University <a href="mailto:dburge@gmu.edu">dburge@gmu.edu</a> 703-993-5487</p>

# PROJECT EXPERIENCE

<b>INSTITUTION:</b>	University of South Carolina – Sumter
<b>PROJECT SUMMARY:</b>	<p>Kennedy &amp; Company worked with the leadership at USC Sumter to redefine the institution’s short and long-term enrollment strategy. A two-year institution located in Sumter, SC, USC Sumter was struggling from a decline in enrollments from its main feeder high schools. The work conducted by Kennedy &amp; Company showed that variances in the demographics in these institutions could account for some of the reductions in new enrollments, but that deficiencies in core operations, such as the use of CRM technology, follow-ups to visits and inquiries, and visits to the local high schools were also in need of improvement. To support the enrollment forecasts, we developed a current-state enrollment projections model that outlined the expected enrollments for the next five years if no changes were implemented. Additionally, we developed a future state enrollment model, which combined the insights from our enrollment strategy assessment with the enrollment forecasts to develop a long-range enrollment plan that could be used for budgeting and projection purposes.</p> <p>Kennedy &amp; Company provided forecasting, recommendations, and implementation support to USC Sumter across a period of five months. Overall enrollments improved by more than 20% after two years, thanks in part to the changes in Sumter’s base enrollment operations.</p>
<b>CONTACT REFERENCE:</b>	<p><b>Dr. Michael Sonntag, Dean</b> USC Sumter 200 Miller Rd, Sumter, SC 29150 Phone: (803) 775-8727 Email: <a href="mailto:sonntagm@uscsumter.edu">sonntagm@uscsumter.edu</a></p>

# PARTICIPATION

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## Communication Plan

Kennedy & Company's recommendations for a comprehensive Educational Master Plan will be supported by a robust communication plan that we will build in concert with SMCCD and deliver to project leadership at the beginning of the process. This plan will outline our touch-points with SMCCD through the culmination of the engagement, including:

- Fact and data-gathering through interviews with key stakeholders at SMCCD at the outset of our engagement
- Periodic update meetings with SMCCD project team leaders and/or work groups
- Ongoing meetings with functional leaders to understand the current state, vision the ideal future state recommendations, and identify potential roadblocks to implementation of the EMP
- Convening of an executive level Steering Committee that will be made up of a broad base of leaders from around the institution and be responsible for the implementation of Kennedy & Company's recommendations
- Opportunities to keep the broader community updated on project progress and milestones

# CURRENT WORK & CLIENT REFERENCES

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*See “Project Experience” section for client reference contact information. Each of these references encompassed all or significant parts of an Enrollment Master Planning assessment.*

# COLLABORATIONS

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*This project is not a joint venture or collaboration. Kennedy & Company's consultants have developed an expertise in delivering Educational Master Planning services and we anticipate conducting all project activities with our internal team.*

# COMPLETION TIMELINE

Kennedy & Company understands the importance of this initiative to SMCCD and realizes that our findings must fit into the Board of Trustees calendar for approval. Our approach will simultaneously work on various initiatives, which will ensure that we meet SMCCD’s deadlines, but we will distribute our work in to meet a deliverable schedule as outlined below:

Task:		Month:	1	2	3	4	5	6	7	8	9
Task 1	Project Organization & Fact Gathering										
	Market & Demographic Analysis				★						
Task 2	Enrollment Forecasting					★					
	Space Needs Assessment							★			
Task 3	Academic Portfolio Analysis									★	
Task 4	Final Report & Presentations										★

★ *Project deliverable*

# COST PROPOSAL

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Kennedy & Company prices its consulting engagements on a fixed-fee basis with differential hourly rates for each role. We have priced our work based on the number of hours we expect each role to work on SMCCD's Educational Master Plan. *This quote is inclusive of all labor, materials, tools, equipment, overhead, profit, and all other direct and indirect costs and expenses are included in the quoted billable hours. To offer SMCCD the best possible price, we anticipate delivering the majority of our work remotely, but will travel to campus for in-person meetings, as needed.*

Our proposed price for this work is \$145,000 and is based on the hourly rates and estimated hours outlined below. If there are any areas of our proposed scope that could be reframed, augmented, or eliminated, we are happy to discuss revisions to scope and fees in order to best align our work with SMCCD's needs and budget. Additionally, if there are necessary increases to the number of meetings, scope of services, or deliverables outlined in this proposal, Kennedy & company will develop an amendment with SMCCD at the prevailing hourly rates shown below.

Role	Estimated Hours	Hourly Rate	Total
Principal & Assoc. Principal	150	\$300	\$45,000
Manager	202	\$225	\$45,000
Analyst	260	\$210	\$54,600
Project Total			<b>\$145,000</b>

*Kennedy & Company's price for the proposed services will not exceed \$145,000*



# APPENDICES

# INSURANCE



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
6/21/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Arthur J. Gallagher Risk Management Services, Inc. 4700 Homewood Court, Suite 260 Raleigh NC 27609-5732		<b>CONTACT NAME:</b> Sheri Williams <b>PHONE (A/C No.):</b> 919-582-4009 <b>FAX (A/C No.):</b> 919-847-3160 <b>E-MAIL ADDRESS:</b> sherj_williams@ajg.com	
		<b>INSURER(S) AFFORDING COVERAGE</b>	<b>NAIC #</b>
		<b>INSURER A:</b> Hanover Insurance Companies	
		<b>INSURER B:</b> Twin City Fire Insurance Company	29459
		<b>INSURER C:</b> Citizens Insurance Company of America	31534
		<b>INSURER D:</b>	
		<b>INSURER E:</b>	
		<b>INSURER F:</b>	

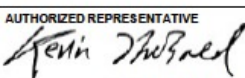
**COVERAGES**      **CERTIFICATE NUMBER:** 1733247579      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDD INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			OHXA15758210	8/11/2022	8/11/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COM/PO/OP AGG \$ \$
A	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			OHXA15758210	8/11/2022	8/11/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE  DED    RETENTION \$			OHXA15758210	8/11/2022	8/11/2023	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000 \$
C	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		Y/N	WBX-A484544-09	8/11/2022	8/11/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 500,000 E.L. DISEASE - EA EMPLOYEE \$ 500,000 E.L. DISEASE - POLICY LIMIT \$ 500,000
B	Professional E&O Cyber Liability			22PG036975621 22KB036974221	8/11/2022 8/11/2022	8/11/2023 8/11/2023	Aggregate Limit \$1,000,000 Retention \$1,000,000 \$5,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 Umbrella policy covers the General Liability and Workers Compensation policies.

**CERTIFICATE HOLDER**      **CANCELLATION**

For Proof of Coverage Only	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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**RFP Appendix A:**  
**Non-Collusion Declaration**

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**STATE OF CALIFORNIA**

The undersigned declares:

I am the Principal (title) of

Kennedy & Company Education Strategies, LLC

(Vendor), which is the Vendor making the foregoing proposal.

This proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The proposal is genuine and not collusive or sham. The Consultant has not directly or indirectly induced or solicited any other vendor to put in a false or sham proposal. The Vendor has not directly or indirectly colluded, conspired, connived, or agreed with any other party to put in a sham proposal, or to refrain from making a proposal. The Vendor has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Vendor or any other party, or to fix any overhead, profit, or cost element of the proposal price, or that of any other vendor. All statements contained in the proposal are true. The Vendor has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, proposal depository, or to any member or agent thereof, to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a vendor that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the Vendor.

I declare under the penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed at Washington, DC 20036 (city and state) on

the 13th day of February, 20 23.

Signed: 

By: Devon McGee, Principal (Printed Name)

This agreement is made and entered into by and between the SMCCCD hereinafter referred to as "DISTRICT", and Kennedy & Company hereinafter referred to as "CONTRACTOR".

## RECITALS

**WHEREAS**, the DISTRICT needs professional services: and;

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

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

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

## AGREEMENT

### 1. DESCRIPTION OF SERVICES

Services shall be rendered per RFP of this agreement.

### 2. TERM

CONTRACTOR will commence work under this agreement on \_\_\_\_\_, and will diligently prosecute the work thereafter. CONTRACTOR will complete the work not later than \_\_\_\_\_. CONTRACTOR shall not commence work until the Board has approved the Agreement. This agreement may be renewed for two (2) additional one (1) year terms upon written notice by DISTRICT.

### 3. COMPENSATION

- a. Payment(s) shall be made in the following manner: in the amounts listed on Exhibit B.
- b. The contract amount shall not exceed the original purchase order amount. No change order can be made or incorporated in to this agreement to increase the not to exceed amount. Therefore, the "**Not to Exceed**" amount for this contract is set at \_\_\_\_\_.
- c. Billing:  
CONTRACTOR shall invoice DISTRICT in upon completion of each phase of services rendered and provide original receipts of all reimbursable travel-related expenses, if applicable.
- d. DISTRICT will not withhold federal or state income tax from payments made to CONTRACTOR under this agreement, but will provide CONTRACTOR with a statement of payments made by DISTRICT to CONTRACTOR at the conclusion of each calendar year.

### 4. TERMINATION

This agreement may be canceled by either party without cause by written notice and with fifteen (15) calendar days.

**5. RELATIONSHIP OF PARTIES**

DISTRICT and CONSULTANT hereby agree and acknowledge that CONSULTANT, in providing the services herein specified, is and at all times shall be acting as an independent contractor. As such, CONSULTANT shall have the right to determine the time and the manner in which the contracted services are performed. DISTRICT shall not have the right to control or to determine the results to be attained by the work of CONSULTANT, nor the details, methods, or means by which that result is to be attained. CONSULTANT shall not be considered an agent or employee of DISTRICT and shall not be entitled to participate in any employee fringe benefits of DISTRICT. The relationship of the parties will be based on the IRS guidelines. The DISTRICT reserves the right to make the final determination as to the correct relationship of the parties.

**6. CONTRACTOR'S STATUS**

Contractor expressly represents and covenants that he/she is a business duly licensed under the relevant rules and regulations of the State of California and that services provided to the DISTRICT are provided pursuant to such rules and regulations.

**7. INSURANCE PROVISIONS**

The commercial general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

- I.
  - A. The DISTRICT, its officers, officials, employees and volunteers are to be covered as insured's as respects: liability arising out of work performed by or on behalf of CONTRACTOR; or automobiles owned, leased, hired or borrowed by the CONTRACTOR
  - B. For any claims related to this project, the CONTRACTOR's Insurance coverage shall be primary insurance as respect the DISTRICT, its officers, officials, employees and volunteers. Any insurance or self-insurance maintained by the DISTRICT, its officers, officials, employees or volunteers shall be excess of the Consultant's insurance and shall not contribute with it.
  - C. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be canceled by either party, except after thirty (30) day's prior written notice has be proved to the DISTRICT.
- II. Professional liability, and/or Errors & Omissions coverages are written on a claims-made form:
  - A. The retroactive date must be shown, and must be before the date of the contract and/or the beginning of the contract work.
  - B. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of contracted work.
  - C. If coverage is canceled or non-renewed, and not replaced with another claims made policy form with a retroactive date prior to the contract effective date, the CONTRACTOR must purchase an extended period coverage for a minimum of five (5) years after completion of contract work.
  - D. A copy of the claims reporting requirements must be submitted to the DISTRICT for review.

- III. Acceptability of Insurers: Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A-VII unless otherwise acceptable to the DISTRICT. Exception may be made for Stat Compensations Insurance Fund when no specifically rated.
- IV. Verification of Coverage: Consultant shall furnish the DISTRICT with original certificates and amendatory endorsements effecting coverage required by the clause. The Endorsement should be in a format that conforms to DISTRICT requirements. All certificates and endorsements are to be received and approved by the DISTRICT before work commences. However, failure to do so shall not operate as a waiver of these insurance requirements. The DISTRICT reserves the right to require complete, certified copies of all required insurance policies, including endorsements affecting the coverage require by these specifications at any time.
- V. Waiver of Subrogation: CONTRACTOR hereby agrees to waive subrogation which any insurer or contractor may acquire from SUBCONTRACTOR by virtue of the payment or any loss. CONTRACTOR agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation.
- VI. Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of the DISTRICT for all work performed by the CONTRACTOR, its employees, agents and subcontractors.

**8. CONTRACTOR shall maintain Insurance with limits of no less than as stated below:**

General Liability shall have a limit no less than of \$1,000,000 per occurrence, \$2,000,000 aggregate for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.

Automobile Liability shall have a limit no less than \$1,000,000 per accident for bodily injury and property damage. The DISTRICT shall be endorsed as additional insured on the policy Workers' Compensation shall have a limit no less that as required by the State of California.

Professional Liability shall have a limit no less than \$1,000,000 per occurrence.

**9. HOLD HARMLESS**

CONTRACTOR agrees to indemnify, save and hold DISTRICT, its officers, agents and employees harmless from any liability for any claims, accusations, or suits at law or in equity, or in any administrative proceeding, that may be brought by third persons on account of personal injury, death, or damage to property, or a property of business or personal interest, or for any fine, forfeiture or civil penalty arising from any act or omission by CONTRACTOR, its officers, agents, or employees while performing operations under the Agreement.

DISTRICT agrees to indemnify, save and hold CONTRACTOR, its officers, agents and employees harmless from any liability for any claims, accusations, or suits at law or in equity, or in any administrative proceeding, that may be brought by third persons on account of

personal injury, death, or damage to property, or a property of business or personal interest, or for any fine, forfeiture or civil penalty arising from any act or omission by DISTRICT, its officers, agents, or employees while performing operations under the Agreement.

**10. AMENDMENTS**

This Agreement may be amended or modified only by written agreement signed by both parties. Failure on the part of either party to enforce any provision of this Agreement shall not be construed as a continuous waiver of the right to compel enforcement of such provision or provisions, nor shall such waiver be construed as a release of any surety from its obligations under this Agreement.

**11. ATTORNEY'S FEES**

Should any party violate or breach any term or condition of this Agreement, any other party shall have, without limitation, the right to move for entry of judgment by a court of competent jurisdiction, to seek specific performance thereof, and otherwise exercise all remedies available to him, her or it under the law to obtain redress from injury or damage resulting from any such violation or breach. In any such legal proceeding(s) brought to enforce the terms and conditions of this Agreement, the prevailing party shall be entitled to recover its reasonable attorney's fees and costs incurred as a consequence hereof.

**12. ENTIRE AGREEMENT**

There are no understandings or agreements except as herein expressly stated. Any modifications must be in writing.

**13. INDEPENDENT CONTRACTOR**

CONTRACTOR is an independent contractor and not an officer, agent, servant, or employee of DISTRICT. CONTRACTOR is solely responsible for the acts and omissions of its officers, agents, employees, contractors, and sub grantees, if any. Nothing in this Agreement shall be construed as creating a partnership or joint venture between DISTRICT and CONTRACTOR. Neither CONTRACTOR nor its officers, employees, agents, or sub grantees shall obtain any rights to retirement or other benefits that accrue to DISTRICT employees.

**14. LAW TO GOVERN: VENUE**

The law of the State of California shall govern this Agreement. In the event of litigation between the parties, venue in state trial courts shall lie exclusively in the County of Santa Monica. In the event of litigation in a U.S. District Court, exclusive venue shall lie in the Central District of California.

**15. NOTICES**

All notices herein required shall be in writing and delivered in person or sent by certified mail, postage prepaid, addressed as follows:

IF TO DISTRICT  
ATTN: Procurement, Contract and Logistics  
Santa Monica Community College District  
1900 Pico Blvd.  
Santa Monica CA 90405

IF TO CONTRACTOR

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**16. VALIDITY**

If any terms, condition, provision, or covenant of this Agreement shall to any extent be judged invalid, unenforceable, void, or violable for any reason whatsoever by a court of competent jurisdiction, each and all remaining terms, conditions, promises and covenants of this Agreement shall be unaffected and shall be valid and enforceable to the fullest extent permitted by law.

**17. ADDENDUM INCORPORATED**

IRS Guidelines attached hereto and incorporated into this Agreement by reference.

**18. STRS RETIREE**

CONSULTANT shall provide DISTRICT with a statement indicating whether or not CONSULTANT is a retired member of the State Teacher's Retirement System of the State of California.

**20. ASSIGNMENT**

This Agreement is neither assignable nor transferable by either party or by operation of law without the consent in writing of the other party. Consent by either party to one or more assignments or transfers shall not constitute consent to a subsequent assignment or transfer.



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# RFP Appendix C Contractor Profile Form & Designation of Names

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CONTRACTOR **Kennedy & Company** Name:

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DUE NO LATER THAN 2:00pm 02/01/23

In response to SMCCD's Notice Inviting Proposals Educational Master Plan Preparation Services, the undersigned submits this firm offer to:

SMCCD  
RFP # 010623SF, Educational Master Plan Preparation Services  
Attn: Procurement, Contracts, Logistics

**Section 1: Designation of Names** Person

Responsible for Bid:

Street Address: 2000 P Street, NW Suite 720,  
SMCCD, State & Zip: Washington, DC 20036  
Telephone: 202-455-8868 Fax: \_\_\_\_\_  
Email: dmcgee@kennedyandcompany.com  
Business Type: Corp - LLC TIN: 46-4288460  
(Corporation, Sole Proprietorship, etc.) (EIN or SSN)

**Section 2: Bid**

CONTRACTOR must enter a fixed price for each Unit Price item in the space(s) provided on the next page of the Bid Form. Bidder's unit prices shall include all labor, materials, tools, equipment, overhead, profit, and all other direct and indirect costs and expenses to produce and deliver as required. Prices must be net including discounts.

I, Devon McGee, the undersigned, the Principal of Kennedy & Company, hereby declare that I am duly authorized to execute this Bid  
(Type/Print Name) (Title)  
(Name of Company)

Form; that I have carefully examined the requirements of this Bid; acknowledge receipt and incorporation of the following Addenda, DM that this Bid Form constitutes a firm offer to SMCCD that if awarded, all prices shall remain effective as required on this Bid Form; and that, under penalty of perjury under the laws of the State of California, to the best of my knowledge and belief, the information contained in this Bid Form is true and correct.

Signature:  Date: February 14, 2023

KENNEDY & COMPANY