

BOARD OF EDUCATION

Attachment: Discussion 18

PALO ALTO UNIFIED SCHOOL DISTRICT

Date: 06.09.15

TO: Glenn "Max" McGee, Superintendent

FROM: Cathy Mak, Chief Business Officer

SUBJECT: Contracts for Legal Services for 2015-16: (1) Lozano Smith; (2) Fagen Friedman and Fulfroost; (3) Dannis Woliver Kelley; and (4) Dora Dome

STRATEGIC PLAN INITIATIVE

Budget Trends and Infrastructure

RECOMMENDATION

It is recommended the Board of Education authorize staff to enter into contracts for legal services for 2015-16: Lozano Smith; Fagen Friedman and Fulfroost; Dannis Woliver Kelley; and Dora Dome. There are no retainers or other fees required with the contract renewals.

BACKGROUND

The District currently contracts with four firms to provide the major part of necessary legal services. Lozano Smith provides the bulk of legal services for the District, including advice on human resources, business, construction, curriculum, and other matters. The Fagen Friedman and Fulfroost firm provides services primarily in special education. The Dannis Woliver Kelley firm provides facilities and construction related services. The Dora Dome firm provides services primarily on student services matters. District legal expenses can fluctuate from year to year depending on the situations that arise requiring legal assistance. Legal expenses have increased in recent years due to the increase in Public Information requests, OCR cases, personnel matters, and a non-completed construction issue in the bond program. Legal expenses for 2014-15 are anticipated to be lower than 2013-14 as many of these cases and issues have been closed or settled.

EXPENDITURE HISTORY

	Lozano Smith (LS)	Fagen Friedman & Fulfroost (FFF)	Dannis Woliver Kelley (DWK)	Dora Dome (DD)	Total
2011-12	\$160,446**	\$111,642	\$ 12,458	\$ --	\$ 284,546
2012-13	\$112,458	\$216,713	\$147,193	\$18,810	\$ 495,174
2013-14	\$314,098	\$446,164	\$381,657	\$26,104	\$1,168,023
2014-15*	\$175,352	\$185,568	\$367,790	\$ 9,404	\$ 738,114
*Partial year cost (through April 2015)					
**Excludes costs related to the 525 San Antonio purchase					
2015-16 Estimated	\$200,000	\$250,000	\$100,000	\$15,000	\$ 565,000

PROPOSAL

It is proposed contracts be renewed to these same firms for the 2015-16 fiscal year: Lozano Smith; Fagen Friedman and Fulfrost; Dannis Woliver Kelley; and Dora Dome. District staff will be as conservative as is prudently possible in its use of attorney funds.

Each firm's rate schedule is attached.

FISCAL IMPACT

The Lozano Smith contract will be funded by the General Fund budget and capital budgets, the Fagen Friedman and Fulfrost and the Dora Dome contracts will be funded by the General Fund budget and the Dannis Woliver Kelley contract will be funded by capital budgets, with the amounts charged to the specific fund requiring the services.