



Evergreen Solutions, LLC

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October 3, 2014

Mr. Frank Antonucci
Purchasing Director
Town of Ipswich
25 Green Street
Ipswich, Massachusetts 01938

Dear Mr. Antonucci:

Evergreen Solutions, LLC, is pleased to submit our non-price proposal in response to your Request for Proposals (RFP) for an Operational Review of Ipswich Public Schools for the Town of Ipswich acting through an Ad Hoc School Audit Committee. The professionals at Evergreen Solutions include some of the nation's leading K-12 experts. Evergreen offers the Town of Ipswich extensive experience in conducting school district operational reviews throughout the country, including in Massachusetts and other New England states. **No other firm matches our Team's expertise in this area.**

Evergreen Solutions was formed to offer an alternative to traditional consulting firms. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider. Evergreen Solutions is a woman-owned business, certified as an M/WBE in many states, municipalities, and school districts throughout the country.

Education clients nationwide have been successfully implementing recommendations provided by our team of professional consultants for decades. Evergreen Solutions has contracted with school districts and other public sector clients in 41 states throughout the country. In the State of Massachusetts, Evergreen conducted an Operational Review of the Hamilton-Wenham Regional School District for the Town of Hamilton and the Town of Wenham and a School Department Operations and Staffing Study for Needham Public Schools.

As President of Evergreen, I will direct this study. I have conducted over 175 operational and performance reviews in school districts throughout the country over the past 30 years. In addition, one of the members of the Evergreen Team, Ms. Betty Ressel, was in charge of the award-winning Texas School Performance Review Program where she completed more than 100 school district operational and efficiency reviews. In addition, she has worked with Evergreen Solutions on numerous school district operational/performance reviews during the past five years.

The following are some of the school districts that Evergreen has worked with, or is currently on contract to work with, including: Manchester Public Schools, CT; Portland Public Schools, ME; Dayton Public Schools, OH; Cleveland Metropolitan School District, OH; Toledo Public Schools, OH; Akron Public Schools, OH; School District of Philadelphia, PA; Richland County School Districts One and Two, SC; Liberty County School District No. 53, MO; Mecklenburg County Public Schools, VA; Martinsville City Public Schools, VA; Loudoun County Public Schools, VA; Williamsburg-James City County Public Schools, VA; Manassas City Public Schools, VA; York County School Division, VA; Clarke County Public Schools, VA; Culpeper County Public Schools, VA; Suffolk Public Schools, VA; Wayne County Public Schools, NC; Halifax Public Schools, NC; Beaufort County Public Schools, NC; Chapel Hill-Carrboro City Schools, NC; Burke County Public Schools, NC; Duplin County Public Schools, NC; Lee and Davie County Public Schools, NC; Rock Hill Schools, SC; Horry County Schools, SC; Tuscaloosa City Schools, AL; Caddo Parrish School Board, LA; Orange County Public Schools, FL; Broward



County Public Schools, FL; Hillsborough County School District, FL; Monroe County Schools, FL; Brevard County Schools, FL; Pinellas County Schools, FL; Douglas County Schools, GA; DeKalb County Schools, GA; Atlanta Public Schools, GA; Los Angeles Unified School District, CA; Albuquerque Public Schools, NM; Gadsden Independent School District, NM; Clinton, Wewoka and Little Axe Public Schools, OK; and many others.

Evergreen Solutions brings forth a very qualified group of project consultants, who together possess more than 75 years of combined experience in conducting operational reviews for school districts throughout the country. We present brief biographies for our senior consultants assigned to conduct the operational review of Ipswich Public Schools for the Town of Ipswich through an Ad Hoc School Audit Committee in **Section 3**.

WHAT SEPARATES US FROM OTHER FIRMS SUBMITTING PROPOSALS?

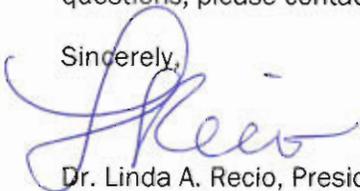
- **First**, the Evergreen Team is comprised of senior consultants who have collectively conducted hundreds of school district operational reviews. Many of us were educators and school district administrators before becoming consultants. Because of this, our school district clients have been comfortable with addressing issues and concerns with us in a collegial manner.
- **Second**, our detailed methodology is unsurpassed (see **Chapter 2**). These tools include self-assessment instruments, interview guides/questionnaires, and focus group guidelines. We have also developed protocols for conducting operational reviews. We are most proud of our operational and performance review procedures manual and our best practices manual— both of which are state-of-the-art documents. Our comprehensive work plan of over 24 pages consists of 15 work tasks and 39 associated deliverables (**Section 2.3**) that incorporates this methodology and provides in-depth detail for each step of the operational review. As you will see, as our very first step, we will review this work plan with the designated Project Manager with the Town of Ipswich, and make any necessary modifications to ensure it fully meets the Town's needs.
- **Third**, Evergreen's client references (see **Chapter 3**) will attest to our ability to provide quality and timely services. Our report will be presented to you on time and will be of an exceptional quality.
- **Fourth**, we will provide technical assistance for implementation of the operational review at no cost to the Town of Ipswich.

In summary, as a result of the numerous operational reviews that the Evergreen Team has conducted throughout the country, as well as our staff's expertise as it relates to K-12 education, we feel we are most qualified to conduct the Operational Review of Ipswich Public Schools for the Town of Ipswich. As you can see in **Chapter 1** of our proposal, we have met the minimum requirements of the RFP, including, more than five years experience in performing similar reviews, direct experience in Massachusetts, experience in evaluating educational program requirements and best practices, and experience working with Massachusetts Department of Elementary and Secondary Education standards and requirements (i.e., due to our previous work with Hamilton-Wenham Regional School District and Needham Public Schools).

As President of Evergreen Solutions, LLC, I am authorized to commit our firm contractually to this assignment. We have reviewed your terms and conditions, and acknowledge we would be able to work within your requirements. We acknowledge receipt of Addendums #1 and #2 and have attached all of the required forms.

We appreciate your consideration and are committed to working with you to achieve your goals. If you have any questions, please contact me at 850.383.0111 or via email at linda@consultevergreen.com.

Sincerely,



Dr. Linda A. Recio, President
Evergreen Solutions, LLC



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Town of Ipswich
Massachusetts
Schools Operational Audit
Addendum #1
September 18, 2014

The Town of Ipswich is issuing this addendum to provide bidders with some standard forms that are required under the procurement laws of the Commonwealth of Massachusetts. Please review and sign the following forms and include them in your bid submission. The Certificate of Corporate Vote form might not apply to all bidders.

If your firm did not receive the RFP bid document please contact Frank Antonucci at 978-356-6608 or franka@ipswich-ma.gov

SECTION 9: STANDARD FORMS

Non-Collusion Statement

The undersigned certifies under penalties of perjury that this bid is in all respects bona fide, fair and made without collusion or fraud with any other person. (The word *person* shall mean any natural person, joint venture, partnership, corporation or other business or legal entity.)

COMPANY NAME Evergreen Solutions, LLC

COMPANY ADDRESS 2878 Remington Green Cir. ZIP 32308
Tallahassee, FL

AUTHORIZED SIGNATURE J. Kew

TELEPHONE NUMBER (850) 383-0111

DATE OF BID 10/6/14

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Tax Certification Affidavit

I Dr. Linda Reclio certify under the pains of perjury that to the best of my knowledge the proposed below bidder has complied with all pertaining tax laws under local, State of Massachusetts and Federal jurisdiction.

Evergreen Solutions, LLC

Name of Bidder

Sheen

Authorized Signature

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Chapter 1

Experience and Qualifications



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1.0 Experience and Qualifications

Evergreen Solutions is well qualified to conduct an Operational Review of Ipswich Public Schools for the Town of Ipswich due to our extensive experience in providing these services to school districts and other education clients throughout the country. In this chapter we provide you with our qualifications, our experience as it relates to the services being requested and the qualifications of our proposed consultant team. We include references in **Chapter 3** of our proposal.

1.1 Evergreen's Qualifications

Evergreen Solutions, LLC is a national, multidisciplinary, public sector management consulting firm, which specializes in working with school districts across the nation. Evergreen Solutions is made up of a group of management and planning professionals who came together to form an innovative alternative that places clients and their needs before any individual, model, or corporate goal.

Evergreen is located in Tallahassee, Florida, and is certified as a W/MBE in numerous states and school districts throughout the country. Since our inception we have worked in 41 states and in over 200 school districts.

We provide a unique approach, rather than the “consulting as usual” approach, by partnering with our clients to find innovative, real world solutions to public education management. Our main focus is on people, management, and technology. This focus allows our team to provide a broad variety of services, including, but not limited to:

- operational reviews/audits;
- management and performance reviews;
- efficiency reviews;
- financial evaluations;
- special education studies;
- human resource studies;
- budget and financial studies;
- food service studies;
- transportation studies;
- facilities studies;
- curriculum audits;
- reviews of risk management;
- grant/program evaluations;
- strategic planning initiatives; and
- safety and security assessments.



We invite you to browse our Web site at www.ConsultEvergreen.com or visit us on Facebook at www.facebook.com or LinkedIn at www.linkedin.com for more information about our services, staff, and past experience.



Evergreen Solutions has assisted many school districts in achieving efficiency and effectiveness. We do that by applying a situation-responsive discipline that emphasizes:

- full visibility into the entire school district through research and discovery;
- a spirit of partnership with our clients;
- sound recommendations based on best practices and proven methods; and
- a practical go-forward plan that leads to quantifiable results.

Collectively, the members of the Evergreen Solutions Team have:

- extensive experience in conducting operational reviews for school districts throughout the country;
- comprehensive experience in all components vital to the successful completion of this operational review;
- knowledge of statutes and regulations, as well as federal education regulations;
- objectivity and flexibility due to the fact that we have no vested interests; and
- specialized analytical tools that we bring to the project.

Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen Solutions has contracted with school districts, institutions of higher education, state education agencies, cities and counties, and non-profit organizations.

Evergreen Solutions is very knowledgeable of school districts, having worked with, or currently on contract to work with, those identified in **Exhibit 1-1** in various consulting capacities, including numerous operational reviews.



**Exhibit 1-1
List of Selected School District Clients**

Dayton Public Schools, OH	Pickens County Schools, SC
Cleveland Metropolitan School District, OH	Caddo Parish School Board, LA
Toledo Public Schools, OH	Atlanta Public Schools, GA
Akron Public Schools, OH	DeKalb County Schools, GA
Minneapolis Public Schools, MN	Douglas Public Schools, GA
Salem City Schools, VA	Orange County Public Schools, FL
York County School Division, VA	Pinellas County School District, FL
Mecklenburg County Public Schools, VA	Hillsborough County School District, FL
Covington City Public Schools, VA	Miami-Dade County Public Schools, FL
Alleghany County Public Schools, VA	Broward County Public Schools, FL
Martinsville City Public Schools, VA	Okaloosa County School District, FL
Williamsburg-James City Co. Public Schools, VA	Brevard County School District, FL
Culpeper County Public Schools, VA	Okaloosa County School District, FL
Montgomery County Public Schools, VA	Monroe County School District, FL
Clarke County Public Schools, VA	St. Lucie County School District, FL
Suffolk Public Schools, VA	Los Angeles Unified School District, CA
Wayne County Public Schools, NC	Albuquerque Public Schools, NM
Beaufort County School District, NC	Gadsden Independent School District, NM
Duplin County School District, NC	Cement Public Schools, OK
Davie County Public Schools, NC	Tipton and Clinton Public Schools, OK
Lee County Public Schools, NC	Wewoka and Little Axe Public Schools, OK
Burke County School District, NC	School District of Philadelphia, PA
Alamance-Burlington School System, NC	Liberty County School District, MO
Halifax County Public Schools, NC	Hamilton-Wenham Regional School District, MA
Chapel Hill-Carrboro City Schools, NC	Needham Public Schools, MA
Richland One School District, SC	Portland Public Schools, ME
Richland Two School District, SC	Manchester Public Schools, CT
Horry County Schools, SC	

As a result of our experience in professional roles, as well as work on past projects, the Evergreen Team has considerable experience in conducting operational reviews and related consulting work. Full case studies or reports from any of our studies are available upon request.



**1.2
Select Relevant
Experience**

We have provided the following education projects that we feel are similar in scope to those services being requested by the Town of Ipswich acting through an Ad Hoc School Audit Committee. Bear in mind that while the titles of studies may differ depending on the client, the study is basically the same. In other words, some school districts refer to an operational review as an effectiveness and efficiency review, management review/audit, performance review/audit, or a diagnostic review.

In **Section 1.3**, we include some of our human resource management projects (i.e., salary and/or staffing studies) to demonstrate our experience in this area since this is part of the scope of services being requested by the Town of Ipswich.



Operational Audit of the Hamilton-Wenham Regional School District Town of Hamilton, Massachusetts

The purpose of the Operational Review was to conduct an external review of the efficiency of various departments and operations within the Hamilton-Wenham Regional School District (HWRSD) and to present a final report of the findings, commendations, recommendations and projected costs and/or cost savings associated with the recommendations.

The first goal of the review was to ensure that non-instructional functions were operating efficiently and to identify short- and long-term savings that could be gained through the implementation of best practices including potential collaboration, regionalization and costsharing.

A second goal of the review was to examine the efficiency of instructional services. The instructional efficiency review results provided guidance to the HWRSD in determining whether educational dollars were being utilized to the fullest extent possible; and where indicated, provided recommendations to reduce costs while maintaining or improving the quality of education.

Note: We have included a copy of the final report from this study in the **Appendix** since a sample report is required according to the RFP.



School Department Operations and Staffing Study Needham Public Schools, Massachusetts

Evergreen Solutions was on contract with Needham Public Schools to conduct a comprehensive review of the following non-instructional support functions of Needham Public Schools:

- Business & Financial Management Systems
- Payroll and Personnel Systems
- Registration and Information Systems
- Clerical and Office Support Function

Specifically, the Evergreen Solutions Team:

- reviewed procedures and practices for consistency with good financial and personnel management practices and applicable state and federal laws;
- evaluated the existing staffing structure to determine whether support staff are utilized in the most efficient and equitable manner, and whether alternative organizational configurations might be more appropriate;



-
- assessed, on a general basis, what skills are required of employees and what types of cost-effective training opportunities can be implemented to foster and improve these skills;
 - evaluated the current and potential use of technology and internal communication systems to support and improve operations;
 - recommended opportunities for organizational efficiency, streamlined operations, improved management practices (including practices that foster a culture of continuous improvement) and better customer service in the aforementioned areas;
 - developed an evaluation instrument for each classification; and
 - developed a plan of action, including estimated costs, for addressing these recommendations.



**Organizational Efficiency and Effectiveness Study
Manchester Public Schools, Connecticut**

The primary intent of this study was to review the operation of the district's central office and business operations (human resources, payroll, purchasing, accounts payable and budget) to make recommendations on staffing and required qualifications and the improvement of the overall efficiency and efficacy of the offices and practices. In addition, the middle management (defined as principals, assistant principals, department heads, directors, coordinators, specialists, supervisors) structure and functions were analyzed to ensure that the leadership and services provided were efficient and effective in support of the district's educational program.

This study documented the current allocation of resources and the anticipated allocation of resources to meet the needs of the district as envisioned by key stakeholders. The goal of the study was to create a cost-effective administrative system that would support the educational program and serve the district well into the future.



Operational Function Optimization Study Minneapolis Public Schools, Minnesota

Evergreen conducted an Operational Function Optimization Study for facilities, plant operations, and transportation for Minneapolis Public Schools (MPS). The School Board approved a contract with Evergreen Solutions to conduct this study.

The project objectives for this study were to:

- Review existing MPS data, conduct an on-site assessment, and utilize external benchmarks and industry-recognized best business practices to identify areas of success and barriers to optimal performance within and among the facilities, plant operations, and transportation functions at MPS.
- Synthesize findings about key strengths and weaknesses of these functions' shared vision and mission, customer relations, organizational structure, process effectiveness and efficiency, and culture.
- Make short- and long-term recommendations for improvement in the following areas:
 - bottlenecks or redundancies in the current flow of work between and within the facilities, plant operations, and transportation functions, schools, other operational departments;
 - customer, vendor, and service partner relationships;
 - efficiency and effectiveness of the facilities, plant operations, and transportation functions' purchasing practices, energy utilization, asset management, quality assurance, and regulatory/safety compliance, including identification of where MPS is overly cautious in its practices;
 - organizational configuration including spans of control, staffing levels, skill levels, workload, and evaluation of current and potential contracted service arrangements to accomplish the facilities, plant operations, and transportation functions; and
 - planning, data, measurement, and benchmark capabilities.

MPS recognized there were opportunities to optimize the overall structure, staffing, processes, practices, and organizational culture of these functions in order to ensure services are efficient, effective, customer-focused and nimble.



**Performance Audit of District Operations
Toledo Board of Education, Ohio**

Evergreen Solutions was selected by the Toledo Board of Education to conduct a Performance Audit of District Operations in Toledo Public Schools. The 90-day Performance Audit included a comprehensive review of central office management; human resources and personnel management; curriculum and instruction; facilities use and management; financial management; transportation; food services; technology; and safety and security. Evergreen's team conducted two extended visits to the district to evaluate operations, including a diagnostic review to gather preliminary data and information on the district, as well as a secondary visit to conduct an in-depth review of each operation.

Evergreen used a number of tools and techniques to conduct the study and gathered information from all stakeholders. In addition to site visits consisting of interviews and focus groups, Evergreen surveyed central office administrators, principals, and teachers. Further, Toledo Public Schools was benchmarked against several peer school districts to assess service delivery, efficiency, and effectiveness. Evergreen paired the results of these activities with a review of operations against industry best practice for each operation to make recommendations on improvements in Toledo Public Schools.

The study concluded with a detailed report on Evergreen's findings and resulting recommendations; each of which detailed implementation steps for the district. Resulting findings and recommendations were aligned with the district's existing mission, strategies, and goals.



**Review of District Operations
Dayton Public Schools, Ohio**

Evergreen Solutions was contracted by the Dayton Foundation to conduct a Review of District Operations in Dayton Public Schools. The study included surveys of central office administrators, principals, and teachers. The review included an assessment of the following areas:

- Facilities;
- Transportation;
- Food Services;
- Administration;
- Human Resources;
- Finance;
- Purchasing;



- Instruction;
- Technology Management; and
- Safety and Security.



Management and Performance Review of Multiple Operations Los Angeles Unified School District, California

The Los Angeles Unified School District (LAUSD) is the second largest in the country with about 694,000 students and 900 schools. No other firm has conducted as extensive work in LAUSD. The Phase I performance review examined in detail LAUSD's infrastructure, operations, and processes, from the central office to local school sites.

As part of a two-phase review, initially, Evergreen Solutions in Phase I studied the most significant audits, reports, and studies on the district's organizational performance and assessed what was implemented, what was not, and the reasons why. Phase I also included an in-depth evaluation of the district's Food Services Program.

In Phase II, Evergreen conducted comprehensive management reviews in the areas of:

- Payroll and Finance
- Human Resources
- Organization, Governance, and Accountability
- Safety and Security
- Instruction
- Parent Engagement

The Phase III contract consisted of implementation facilitation for the Phase II studies.

Evergreen continues to conduct performance reviews with the LAUSD under a contract with the Inspector General's Office. We recently completed a salary survey for LAUSD.



Organizational and Operational Review School District of Philadelphia, Pennsylvania

The School District of Philadelphia is the eighth largest in the nation. In June 2006, Evergreen Solutions, LLC was awarded a contract to conduct an Organizational and Operational Review of the school district. The audit was linked with an action plan for implementation of systemic performance improvement and institutionalization of successes. The audit team provided findings, recommendations,



and commendations on the current organizational structure of the district, including:

- facilities;
- transportation;
- capital and facilities planning;
- financial/fiscal management;
- governance;
- special education;
- administrative management;
- governmental operations;
- grant funding;
- stakeholders' communications and relations;
- human resources management;
- information technology;
- legal; and
- delivery of all services not tied directly to academics.



Financial and Facilities Audit Cleveland Metropolitan School District, Ohio

Evergreen Solutions conducted two projects for the Cleveland Metropolitan School District (CMSD): an assessment of financial operations and a capital projects review. For the financial audit, Evergreen assessed the management of the Finance Department and the following functional areas:

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|-----------------------------------|----------------------------------|
| • Board Resolutions | • Internal Controls |
| • Budgeting | • Internal and External Audits |
| • Grants Management | • Student Activity Funds |
| • Asset and Risk Management | • Record Keeping |
| • Cash Management and Investments | • Financial Management Reporting |
| • Accounts Payable | • Financial Management Oversight |
| • Purchasing and Contracts | • Inventory Control |
| • Accounts Receivable | |
| • Payroll | |

The study included 79 specific recommendations to improve efficiency and effectiveness in these functional areas.

Evergreen also reviewed the efficiency and effectiveness of the current CMSD Finance Department. Evergreen estimated that the fiscal impact of implementing all report recommendations would result in a net savings of approximately \$9.3 million over the next five years.



For the facilities construction review, Evergreen Solutions conducted an assessment of the district's \$1.5 billion, 10-year capital projects initiative. This included a review of how well the Cleveland Metropolitan School District is meeting the objectives of its Facility Master Plan with respect to project planning, design, and construction, the procurement process, and oversight and budgetary controls. Evergreen also reviewed the district's budgetary, financial, and internal control systems specific to the Facility Master Plan, as well as the implementation of administrative and instructional technology in new and renovated school buildings.



**Operational Effectiveness and Efficiency Audit
Richland Two School District, South Carolina**

Evergreen conducted an operational effectiveness and efficiency audit of operational and instructional services in the Richland Two School District, one of the largest in South Carolina. The review included an analysis of programs and operations as well as employee surveys and benchmarking against comparison school districts. The areas that were reviewed included:

- District Administration;
- Instruction;
- Finance;
- Personnel and Human Resources Management;
- Facilities;
- Technology Management;
- Transportation; and
- Safety and Security.



**Diagnostic Review
DeKalb County Public Schools, Georgia**

Evergreen Solutions was on contract to assist the Superintendent and senior staff of the DeKalb County School System, the third largest school district in Georgia, and to develop a plan for downsizing the central office. The first phase of this process involved a diagnostic review of the school district with an analysis of all operations and programs. The focus of this review was on generating cost savings in non-instructional operations.



**Study of Structure and Organization of State Board of Administration
North Carolina General Assembly**

Evergreen Solutions was on contract with the Program Evaluation Division of the General Assembly, as part of the Appropriations Act of 2008, to conduct a performance review of education in the State of North Carolina. This analysis included a review of the State Board of Education, the State Superintendent of Education, and the Department of Public Instruction.

The study included, but was not be limited to:

- roles of agencies and individuals;
- analysis of governance structure;
- oversight and accountability;
- peer state education agency size and output comparison;
- analysis of Department of Public Instruction organization problems;
- analysis of Department of Public Instruction accountability and quality; and
- best practices of similar organizations.

The study concluded with a comprehensive report and implementation plan, multiple presentations to the General Assembly, and legislation.



**Performance Review of the Duplin County School System
Duplin County Board of County Commissioners, North Carolina**

The Duplin County Commissioners contracted with Evergreen Solutions to complete a performance review of the Duplin County School System. This review included a detailed analysis of all of the school system's financial management functions, including payroll, internal allocation of resources, internal controls, impact of federal and state reporting requirements, discretionary spending, use of technology to support financial functions, use of grant funds, procurement, and travel expenditures. The project also included a review of the system's other operations, including organization and management, human resources, food service, transportation, and facilities.



**Performance Audit and Financial Review
Lee County Board of County Commissioners, North Carolina**

Lee County hired Evergreen Solutions to conduct a comprehensive Performance Audit of Lee County departments as well as a detailed Financial Review of Lee County Public Schools (LCPS). The first section of the study, the financial review of school operations, aimed at assisting Lee County Public Schools in continuing to succeed and improve in its primary mission, the education of all students. The second part of the study, the performance audit, focused on the organizational, operational, and financial efficiency and effectiveness of Lee County operations from a departmental standpoint. In the end, Evergreen presented findings and recommendations to key stakeholders on containing costs, improving management strategies, and improving the overall efficiency, effectiveness, and productivity of the county and the school district.

The initial phase of the study involved a careful analysis of Lee County Public Schools. According to statistics provided on Lee County Public Schools, approximately 9,654 students were educated in LCPS in the 2010-11 school year. The district consists of 16 schools and employs approximately 1,258 people, including 621 classroom teachers. Evergreen conducted a comprehensive financial review of school operations and carefully scrutinized the district based on available financial information. Specifically, the financial review included summarizing the status of each district funding source; reporting on the status of district financial resources; analyzing Lee County's funding of Lee County Public Schools; and recommending strategies for improvements in the use of funds in Lee County Public Schools. Concurrent with the review of school district financial operations, Evergreen conducted phase two of the study; an analysis of county government operations in each department. Specifically, Evergreen reviewed past reports and existing data sources (policies, organizational charts, financial audits, job descriptions, salary schedules, employee handbook, etc.), conducted interviews, and established a channel for community input to begin the analysis. Next, Evergreen's team benchmarked Lee County operations to operations in peer districts using comparative data and statistical analysis. Pairing the outcome of this analysis with findings from on-site reviews and interviews, Evergreen determined areas where the county could make improvements to existing processes, plans, and procedures.



**Performance Audit and Financial Review
Davie County, North Carolina**

Evergreen Solutions was retained by Davie County to conduct a comprehensive Performance Audit of Davie County departments as well as a detailed Financial Review of Davie County Public Schools. The first part of the study, the performance audit, focused on the organizational, operational, and financial efficiency and effectiveness



of Davie County operations from a departmental standpoint. The second segment of the study, the financial review of school operations, aimed at assisting Davie County Public Schools in continuing to succeed and improve in its primary mission, the education of all students. In the end, Evergreen presented findings and recommendations to key stakeholders on containing costs, improving management strategies, and improving the overall efficiency, effectiveness, and productivity of the county and the school district.

The initial phase of the study involved a careful analysis of county government operations in each department, including human resources, information technology, public safety, health, social services, solid waste and water, tax, and several other departments. Specifically, Evergreen reviewed past reports and existing data sources, conducted interviews, and established a channel for community input to begin the analysis. Next, the Evergreen Team benchmarked Davie County operations to operations in peer districts using comparative data and statistical analysis. Pairing the outcome of this analysis with findings from on-site reviews and interviews, Evergreen determined areas where the county could make improvements to existing processes, plans, and procedures.

Following the review of county government operations, the Evergreen Team shifted their focus to Davie County Public Schools, conducting a comprehensive financial review of school operations during this second phase. The district, which educates over 6,500 students and employs approximately 865 full-time staff, was scrutinized based on available financial information. To conclude the study, the current status of district financial resources was summarized by Evergreen, including budgets by fund source (federal, state, and local), and recommendations were made as to how the district could improve the use of allocated funds.



**Performance Review of the Burke County School System
Burke County Board of County Commissioners, North Carolina**

The Burke County Commissioners contracted with Evergreen Solutions to complete a performance review of the Burke County School System. This review included a detailed analysis of all of the school system's financial management functions, including accounts payable, payroll, internal allocation of resources, internal controls, impact of federal and state reporting requirements, use of grant funds and procurement. The project also included a review of the other operations in the Burke County School System, including organization and management, technology, safety and safety, human resources, food service, transportation, and facilities.



Operations Review
Alamance-Burlington School System, North Carolina

Evergreen Solutions contracted with the Alamance-Burlington School System (ABSS) to conduct a comprehensive review of the Financial Division, including:

- Financial Management
- Financial Performance
- Planning and Budgeting
- Internal and External Auditing
- Asset and Risk Management
- Purchasing, Contracting, and Warehousing.

Evergreen Solutions completed a second review with ABSS in the areas of transportations, food services, and human resources.



Feasibility Study for School System Improvements
Halifax County, North Carolina

Evergreen Solutions was selected by Halifax County, North Carolina to conduct consulting and related services to provide an in-depth Feasibility Study on the potential for consolidating school systems or making other improvements in Halifax County's three public school systems. The primary intent of this study was to review the operations of the three school districts in order to make recommendations on improvement of the overall efficiency and efficacy of their operations. In the end, Evergreen submitted to Halifax County a comprehensive report detailing options for improving the school systems, which included an evaluation of the pros and cons of consolidating the three districts.

The study included a detailed analysis of specific areas of the three districts, including the financial situation as it presently stands with the three school systems; the educational impact of each school system; student populations and how best to assign students to schools; future population estimates to plan for accommodating the expected number of students; and other information as relevant to the comprehensive nature of the study. Evergreen's Team used a combination of tools to collect and analyze pertinent data, including peer district benchmarking, best practice databases, online surveys, survey benchmark database, and interviews and questionnaires.



**Financial Audit of the Beaufort County School District
Beaufort County School System, North Carolina**

The Beaufort County Commissioners contracted with Evergreen Solutions to complete a financial audit of the Beaufort County School System, North Carolina. This review included a detailed analysis of all of the school district's financial management functions, including:

- travel expenditures;
- payroll system;
- internal allocation of resources;
- internal controls;
- impact of federal and state reporting requirements;
- discretionary spending;
- use of technology to support financial functions;
- use of grant funds;
- procurement; and
- education foundation.

The project also included a review of the district's other operations, including:

- Facilities Maintenance and Use of Capital Funds;
- Transportation;
- Food Service;
- District and School Organization and Management;
- Human Resources; and
- Technology.



**Facilities Review and Finance Assessment
Wayne County School District, North Carolina**

Evergreen Solutions conducted a Facilities Review and Finance Assessment of the Wayne County School District. The study reviewed all aspects of finance, including but not limited to, budgeting, payroll, purchasing, asset and risk management, accounts payable, and internal and external auditing. The facilities review examined the proposed facilities plan as well as the condition of school system facilities, building maintenance, energy management, and construction and renovation projects.



**Evaluation and Analysis of Operations Department
Rock Hill Schools, South Carolina**

Rock Hill Schools contracted with Evergreen Solutions to provide a comprehensive assessment of its Operations Department including the following areas to be evaluated:

- personnel - organization and staffing levels, administration and management staff, office support staff, maintenance staff, grounds staff, and custodial staff;
- procedures - payroll and time reporting, work order system authorization and control, purchasing procedures, budget procedures and cost controls, preventive maintenance, warehousing, safety, and emergency preparedness;
- fleet vehicles and equipment management;
- energy management and control;
- training and skill development programs; and
- communications – internal and external.



**Consulting Services for Facility Department Processes
Horry County Schools, South Carolina**

Evergreen Solutions is engaged with Horry County Schools to provide consulting services for Facility Department processes in the areas of capital improvement, custodial, and maintenance. In the area of capital improvement, Evergreen consultant's will assist in developing standard processes and procedures for the construction, installation, and/or assembly of capital projects including, new assets, or the alteration, expansion, or extension of an existing asset to accommodate a change of function or unmet programmatic needs. Evergreen will work with Horry County Schools to establish an annual schedule for the review of sustainment projects so that the Board and community will know what is planned.

In the area of custodial, Evergreen's consultants will develop an improved management system for work activities performed on a recurring basis throughout the year for the purpose of meeting routine, daily operational needs. Work activities will include the daily work of cleaning and recurring maintenance performed by custodians, grounds workers, and general maintenance crews.



In the area of maintenance, Evergreen's consultant's will develop an improved management system for work activities performed on either an unscheduled or a scheduled basis to resolve current maintenance deficiencies. These work activities will include corrective, preventive and predictive maintenance for buildings, structures, as well as installed building equipment (113E) in accordance with manufacturer and industry standards.

In the end, Evergreen will train all staff on new standards, guidebook and processes with fully functional District leadership and will provide assistance in developing future staff development and training opportunities.



**School Efficiency Review of the Martinsville School Division
Virginia Department of Planning and Budget**

Evergreen Solutions, LLC conducted a school efficiency review in the City of Martinsville School Division in Virginia. The purpose of this project was to provide an objective review of the efficiency of non-instructional services in this school division. The overall goals of this endeavor were 1) to identify opportunities to reduce costs in non-instructional areas to allow the division to channel any such savings into instruction, and 2) to identify best practices followed by the division that may be shared with other divisions statewide in Virginia. The study analyzed division management, governance, education service delivery, special education, transportation, food service, technology, facilities, and finance.



**School Efficiency Review
Mecklenburg County School Division, Virginia**

Evergreen Solutions was on contract to conduct a school efficiency review in Mecklenburg County School Division in Virginia. The study analyzed district management, governance, student achievement, school performance, parent – community engagement, facilities, transportation, food service, technology, and finance. Over half the recommendations have been implemented.



School Efficiency Reviews
Alleghany County and Covington City Schools, Virginia

Evergreen Solutions was on contract to conduct school efficiency reviews in Alleghany County and Covington City Public Schools in Virginia. A major part of those reviews were an examination of shared services between the county and the city school divisions as well as between each school division and its respective local government. The study analyzed district management, governance, student achievement, school performance, parent and community engagement, facilities transportation, food service, technology, and finance.



School Performance Reviews
Oklahoma Office of Accountability

Evergreen Solutions was retained by the Oklahoma Office of Accountability to conduct school performance reviews in two Oklahoma Public Schools – Cement Public Schools and Tipton Public Schools.

The school performance reviews of Cement Public Schools and Tipton Public Schools consisted of the following components:

- **Management, Personnel, and Communications:** Findings, commendations, recommendations, and estimates of costs and savings regarding the school district's organization, management, and personnel as well as the district's long-range planning process and community involvement.
- **Instructional Delivery:** Findings, commendations, recommendations, and estimates of costs and savings regarding the school district's instructional delivery, educational programs, and technology related to instruction.
- **Business Operations:** Findings, commendations, recommendations, and estimates of costs and savings regarding the school district's business operations, asset and risk management, financial management, purchasing and warehouse services, human resources, and payroll.
- **Facilities Use and Management:** Findings, commendations, recommendations, and estimates of costs and savings regarding the school district's facilities use and management, safety and security, and energy management.



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- **Support Services:** Findings, commendations, recommendations, and estimates of costs and savings regarding the school district's support services. These services include computers and technology, food services, and transportation services.



**Yellow Book Performance Audit of the Administrative and Overhead Operations at the Ten Largest School Districts in State of Washington
Washington State Auditor's Office (sub to Cotton and Company)**

Evergreen Solutions, as a subcontractor to Cotton and Company LLP, provided its education expertise in a comprehensive, independent performance audit of the administrative and overhead operations of the ten largest school districts in the State of Washington. The districts reviewed included:

- Seattle School District
- Tacoma School District
- Spokane School District
- Kent School District
- Evergreen (Clark) School District
- Lake Washington School District
- Federal Way School District
- Vancouver School District
- Puyallup School District
- Edmonds School District

The audit reviewed and analyzed the economy and efficiency of the administrative and overhead operations at these school districts and were conducted in accordance with government auditing standards.



**Management and Curriculum Audit
Guam Public School System**

The purpose of this project is to provide an objective Management and Curriculum Audit for the Guam Public School System. Evergreen Solutions will conduct an independent management and curriculum audit using nationally recognized auditing standards, inclusive of academic (curricular) programs and operational (support) services. The purpose of the school management and curriculum audit is to identify and assess deficiencies in GPSS's organizational structure; compliance with federal and local laws; compliance with board policies; physical and operational security; workflow designs and management; internal controls; staffing levels and competencies; management levels and competencies; management practices;



training standards and practices; compliance and creation of policies and procedures; adequacy of facilities; physical plant management effectiveness and efficiency; technical and administrative infrastructure; redundancy of systems and procedures; productivity and quality standards; recruitment, certification, and training of teachers; and recruitment, training and staff development.

P.L. 29-19, Section 84 requires that a management and curriculum audit of the Guam Public School System be conducted. There is a need to conduct periodic assessments focus on management and curriculum audits of the Guam Public School System for the following purposes:

- to ascertain whether the System is providing an adequate public education as defined by the Title 1 GCA 715;
- to evaluate the effectiveness of GPSS administrators in implementing board policy and in fulfilling assigned objectives;
- to evaluate the effectiveness of GPSS-instructional personnel and their ability to meet curriculum goals; and
- to recommend alternatives to correct systemic deficiencies and to improve the ability of GPSS personnel to fulfill assigned objectives.



Evaluation of Florida's Race to the Top Grant Program Florida Department of Education

Evergreen Solutions was hired in 2011 by the Florida Department of Education to evaluate the state's \$700 million Race to the Top (RTTT) grant program. The national Race to the Top grant program was announced in 2009 as part of the American Recovery and Reinvestment Act. Race to the Top aims to raise student achievement by focusing all initiatives on eight specific national reform criteria, including:

1. Supporting the transition to enhanced standards and high-quality assessments.
2. Accessing and using state data.
3. Using data to improve instruction.



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4. Improving teacher and principal effectiveness based on performance.
 5. Ensuring equitable distribution of effective teachers and principals.
 6. Improving the effectiveness of teacher and principal preparation programs.
 7. Providing effective support to teachers and principals.
 8. Turning around the lowest-achieving schools.

In late 2010, the United States Department of Education announced that Florida, along with ten other states, would be the recipient of Race to the Top grant funds. The Florida Department of Education will execute the state's Race to the Top grant program through a series of 14 local education agency (LEA) projects and 50 state-level projects, which each fall under one of the eight national reform criteria. In Florida, 62 school districts will participate in the state's Race to the Top grant program. Evergreen Solutions will work with state leaders to implement a comprehensive evaluation plan of Florida's Race to the Top program to measure success of the 50 state-level projects as well as the state's oversight and support of the 14 LEA projects.

In August 2011, prior to being selected as the state's Race to the Top grant evaluator, Evergreen Solutions was selected to design the evaluation work plan for Florida's Race to the Top program. The evaluation work plan includes specific yet adaptive evaluation tasks that will ensure all 50 state-level projects are conducted efficiently and effectively, and with fidelity to the state's original scope of work. Evergreen's work plan for the evaluation of Florida's Race to the Top program includes 17 work tasks, 139 task activities, and 87 unique deliverables. These activities include data collection and analysis, interviews, focus groups, surveys, and onsite visits as well as formative evaluation activities to be conducted throughout the remaining three years of the grant program and summative evaluation tasks to be completed at the end of the state's four year Race to the Top grant program. Grant evaluation teams will be organized around each of the eight national reform criteria and will ensure that success is measured and reported for all of the 50 state-level projects.

Following finalization of the Race to the Top evaluation work plan, Evergreen Solutions was selected in November 2011 by the Florida Department of Education to lead implementation of the Race to the Top evaluation work plan. Evergreen's selected team of evaluators includes 19 subject matter experts who will work closely with the Florida Department of Education's Race to the Top project team to evaluate grant activity. Evergreen's comprehensive information and data system will be used for reporting and data collection during the evaluation. Evergreen Solution's evaluation of Race to the Top will conclude in June 2015 with a comprehensive report on Florida's success in implementing the Race to the Top program.



**Evaluation of K-20 Data Project
Montana Office of Public Instruction**

Evergreen was selected by the Montana Office of Public Instruction (OPI) to evaluate the state's \$1.2 million dollar K-20 Data Project. The K-20 Data Project will connect existing OPI databases to databases owned and operated by the Montana University System (MUS). This will allow OPI to design data reports and dashboards to assist stakeholders in assessing college readiness of Montana K-12 students. Specifically, the K-20 database will enable stakeholders to retrospectively assess the success of college students in the MUS and correlate that success (or failure) to that student's K-12 experience. This effort represents an exciting step for both the OPI and MUS, as little if any data are currently available linking K-12 and post-secondary outcomes.



**Efficiency Study of Transportation Services
Orange County Public Schools, Florida**

Evergreen Solutions served as a subcontractor to the TransPar Group in a comprehensive study of the efficiency of transportation services in Orange County Public Schools (OCPS). Evergreen examined administrative functions, including budget, payroll, overtime, field trips and personnel issues. The study focused on organizational efficiency; data reporting; staffing and organization; vehicle maintenance; and various other aspects of the transportation system employed at OCPS. The overall goal was to increase operational efficiency in all areas possible in order to reduce costs in the transportation function of the school district.

Evergreen Solutions focused primarily on state-level, finance, and compliance matters. Specifically, the Evergreen Team determined which costs were out of line based upon rider counts, miles, buses, and Florida comparisons as well as established action items that addressed each inefficiency that was identified. Evergreen Solutions analyzed the current process for collecting transportation data in the school district and determined if the data were accurately compiled and reported to the Florida Department of Education.



**Organizational Audit and Staffing Study
Monroe County School District, Florida**

Evergreen Solutions conducted an Administration and Support Staffing Study of the Monroe County School District. Evergreen Solutions reviewed the areas of district organization and management, facilities, financial management, education service delivery, public relations, and human resources management.



**Food Services Audit
Okaloosa County School District, Florida**

Evergreen Solutions was contracted to assist Carr, Riggs & Ingram, LLC in conducting a comprehensive review of the food services operation of Okaloosa County School District. The food services operation serves nearly 30,000 students daily districtwide. Evergreen Solutions consultants were asked to review the areas of organization and staffing; policies and procedures; facilities and equipment; and, student meal participation with the goal of improving the financial performance of the food services department.



**1.3
Human Resource
Experience**

The following includes a sample of some of our human resource consulting work (i.e., salary and/or staffing studies) to demonstrate our experience as it relates to a portion of the scope of services included in the RFP for the Town of Ipswich.

**Staffing Audit and Salary Study
Richland One School District, South Carolina**

Evergreen Solutions, LLC, conducted a Staffing Audit and Salary Study of the Richland County School District One. Evergreen Solutions reviewed staffing in the areas of human resources management, district organization and management, facilities, financial management, education service delivery, and public relations. As a part of this comprehensive study, Evergreen Solutions conducted a salary survey and job analysis, which included written surveys of central office administrators, principals, and teachers.



**Human Resources Department Review/ Salary Study
Akron Public Schools, Ohio**

Evergreen is engaged with Akron Public Schools (APS) to conduct a Human Resources Department Review and a Salary Study. Evergreen's consultants will conduct the following tasks:

- review Human Resources Department staff and processes to determine appropriate staffing levels and provide recommendations and strategies for the development of new and/or revised processes, programs and practices;
- recommend the elimination and/or outsourcing of processes, programs or practices as deemed appropriate; and
- review Principal and Central Office Administrator salary schedules and provide recommendations as to whether revisions needed to be made to the salary schedule and/or whether another type of salary system should be developed (i.e., merit pay system).



**Compensation and Classification Study
Liberty County School District No. 53, Missouri**

Evergreen Solutions is retained by the Liberty County School District No. 53 (District) to conduct a Compensation and Classification Study for non-certified staff (i.e., 862 support staff). Evergreen will assist the District in reviewing and analyzing the current support staff compensation and benefit structure and will make recommendations for improvements to the existing system(s) to ensure alignment with the Kansas City labor market and are sufficient to recruit and place qualified applicants for these positions that include Facilities & Maintenance, General Office Support, Kid's Zone, Medical, Nutrition Services, Para, Purchasing & Distribution, Security, Teacher Support, Technology, Therapist (Physical, Occupational, and Recreational) and Transportation. Evergreen will consider the total compensation package received by support staff employees with the District as it relates to both the external and internal market and will provide an analysis of compensation policies and practices and recommendations to formalize a long-term compensation strategy.



Compensation, Classification, Organizational Design, and Structure Study

Portland Public Schools, Maine

Evergreen Solutions was retained by Portland Public Schools to conduct a detailed compensation and classification analysis of its total workforce. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity. Also included in the study was a review of the performance evaluation system and tools. Recommendations were provided on how to improve the current system and the proper tools for evaluating employees.



Pay Plan Study

Salem City Schools, Virginia

Evergreen Solutions was hired by the City of Salem School Division in Virginia to conduct a pay plan study for both certified and classified employees within the Division (i.e., 589 employees). As part of the study, the Evergreen Team conducted interviews and focus groups with Division employees, and conducted a comprehensive market survey of local and regional employers to assess the market competitiveness of the Division. A detailed plan was developed to provide the Division with specific steps to implement an equitable and competitive compensation plan.



Compensation and Classification Study

Suffolk Public Schools, Virginia

Evergreen was initially hired in 2007 by Suffolk Public Schools to conduct a division-wide Compensation and Classification Study for all employees. Evergreen provided Suffolk Public Schools with recommendations for the implementation of a revised pay plan.

Evergreen was again hired in 2014 to provide a Classification and Compensation Plan Update for Suffolk Public Schools on behalf of the Suffolk City School Board. As part of the study, Evergreen's consultants will conduct orientation sessions, focus groups, and interviews with employees, and collect Job Assessment Tools (JATs) from all 2,079 employees. Evergreen's consultants will conduct a



comprehensive salary survey of local and regional employers to assess the market competitiveness of the school division. Finally, a detailed plan will be developed to provide the Suffolk Public Schools with specific steps to implement an equitable and competitive compensation plan.



**Compensation Study
Williamsburg-James City County Public Schools, Virginia**

Evergreen Solutions was hired to conduct a Compensation Study for the Williamsburg-James City County Public Schools. Evergreen's consultants evaluated the present classification system, conducted on-site orientation sessions and focus groups with employees and managers to familiarize them with the project and gathered their feedback on the system. Additionally, Evergreen consultants met with senior managers and department heads to obtain their unique input as to the strengths and weakness of the system as it related to their specific area of expertise. Recommendations regarding changes that were needed to the current system were provided.



**Employee Classification and Compensation Analysis
Manassas City Public Schools, Virginia**

Evergreen Solutions was retained by Manassas City Public Schools to conduct a detailed compensation and classification analysis of its total workforce. Employees participated in focus groups, interviews, and a job analysis to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were made to improve the fairness and equity.



**Compensation Study
York County School Division, Virginia**

Evergreen was retained by the County of York to conduct a Compensation Study for the York County School Division (YCSD) for approximately 904 licensed staff (i.e., teachers). Evergreen's consultants conducted a comprehensive evaluation of YCSD's existing teacher salary schedule for licensed staff which included a



review of the current salary structure for teachers to identify any potential problems to be resolved. Alternative forms of compensation were reviewed, such as longevity pay, advanced degrees, and Board certifications, for teacher salaries.

Evergreen conducted an external labor market salary survey using comparison peers, taking into consideration the number of days licensed staff in the comparison groups were required to work. A summary of the survey results were provided to YCSD. Evergreen also provided recommendations regarding any necessary changes to the current salary structure. Recommendations also included transitioning staff to the proposed teacher salary plan structure.



**Compensation Study
Loudoun County Public Schools, Virginia**

Evergreen Solutions was retained by Loudoun County Public Schools to conduct a detailed compensation analysis of its instructional and support workforce. Major regional peers were included in the salary survey and recommendations were made on how best to position Loudoun County in the future.



**Classification and Compensation Study
Culpeper County Public Schools, Virginia**

Evergreen Solutions was engaged with Culpeper County Public Schools (Division) to conduct a Classification and Compensation Study that assisted the Division in updating its classification plan, revising salary administration guidelines, and developing a strategy to increase employee's pay to a competitive level that aligned with the results of the study. Evergreen provided recommendations regarding necessary changes to the Division's current salary and classification structure and updated and revised job descriptions and made FSLA determinations. Evergreen further recommended the appropriate salary range for each existing or proposed position based on the classification plan, the compensation survey results, and internal relationships and equity and prepared a new salary structure based on the results of the market salary survey and best practices. The salary range took into account the unique nature of certain functions and responsibilities which were characteristic of certain jobs and departments in school divisions. Evergreen further developed a strategy to increase current employees pay to a competitive level that aligned with the results of the compensation study.



**Pay and Classification Study
Clarke County Public Schools, Virginia**

Evergreen Solutions is retained by Clarke County Public Schools (Division) to conduct a pay and classification study that will provide internal equity and yet allow the division to be competitive in the marketplace in attracting and retaining qualified employees. Evergreen's consultants will: assist the division in reviewing and updating (if necessary) existing job descriptions and specifications to uniformly reflect distinguishing characteristics, essential job functions, minimum qualifications, working conditions, license requirements, regulatory requirements, standby/call out responsibilities, etc. for all classifications; obtain market data and make recommendation on updating the division's classification plan to reflect the current market; review current classification grade methodology, and propose recommended strategies for the division; identify management, supervisory, professional, technical, and general employees, including Fair Labor Standards Act (FLSA) and Affordance Care Act (ACA) status (exempt/non-exempt); assist in reviewing the division's current salary administration guidelines and make recommendations on implementing strategies that will pay employees for additional duties, education, and qualifications, and ensure that the compensation plan remains competitive in future years; and recommend appropriate salary range for each existing or proposed position based on the classification plan, the compensation survey results, experience, and internal relationships and equity. **Note:** Evergreen is in the final stages of completing this project.



**Classified Employment Study
Chapel Hill-Carrboro City School, North Carolina**

Evergreen was hired by Chapel Hill-Carrboro City Schools (CHCCS) to conduct an Employment Study for all classified employees (i.e., 800). The intent of the study was to identify opportunities for making improvements, adjustments, and corrections in the district's operations (i.e., job structures, staffing levels and pay scales), as well as allow CHCCS to remain competitive in retaining and attracting talent for classified positions.

Classified employees participated in focus groups, interviews, and a job analysis to determine the best classifications for the work performed. In addition, staffing levels and pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for included jobs. Evergreen developed recommendations and guidelines for the continued administration and maintenance of the classification and compensation structure,



including recommendations and guidelines related to: how classified employees will move through the pay structure/system as a result of transfers, promotions, or demotions; how to pay employees whose base pay had reached the maximum of their pay range or value of their position; the proper mix of pay; how often to adjust pay scales and survey the market; the timing of implementation; and how to keep the system fair and competitive over time. Evergreen provided the necessary training and materials to the appropriate CHCCS staff so that an understanding of the methodology and how to implement, administer, and maintain the recommended total compensation system was accomplished.



Teacher Compensation Analysis Chapel Hill-Carrboro City School, North Carolina

Evergreen was hired by Chapel Hill-Carrboro City Schools (CHCCS) to conduct a Teacher Compensation Analysis. CHCCS currently provides annual salary supplements to teachers based strictly on years' of experience. However, the District was interested in conducting a concept exploration to assess the impact of moving to a model in which teacher pay supplements are provided based on completion of professional development instead of longevity. Evergreen was selected to assist CHCCS in this process.

The first step in the process included determining the amount of funds currently paid out annually in the form of longevity supplements, which established the pool of available funds available to implement alternative professional growth models if the longevity supplements were eliminated. Evergreen completed this by conducting an analysis of the teacher salary database provided by CHCCS.

Evergreen then worked with CHCCS to develop two models for distributing teacher supplements based solely on professional growth. Both models designed provided teachers with a supplement based on the amount of professional development they complete. Professional development offerings were divided into tiers (tiers 1-4, with Tier 4 being the highest level and each tier taking anywhere from 1-3 years to complete). In the first model, teachers were provided a percentage increase to their base salary for each Tier completed. In the second model, teachers were provided a lump sum increase to their base salary for each Tier completed. The salary increases provided in both models were designed to allow teachers to reach the same level of supplement overtime as they could in the existing longevity model; however, whether or not they reached the highest level was dependent on their own drive and willingness to participate in professional develop offerings.



Finally, Evergreen created financial impact forecasts for the models and multiple scenarios to determine long term costs of each. The calculations included consideration for those teachers that would be grandfathered into the existing longevity based model. Further, turnover was not included as a variable in the analysis because the turnover data available from CHCCS were not specific enough to determine turnover likelihood based on years' experience.

Evergreen provided a presentation to the CHCCS Board that included an overview of the current system (including five-year cost), an overview of the two models developed, cost impacts of and assumptions used for each scenario, a comparison of five-year costs under the existing model and alternative models, and a discussion on next steps in determining if further conversation was warranted for either model. **Note:** Evergreen was again hired Evergreen was hired by CHCCS to conduct a Central Office and School Administrator Compensation Analysis.



**Compensation, Classification and Staffing Study
Pickens County Schools, South Carolina**

Evergreen Solutions was hired by the School District of Pickens County, to conduct a Comprehensive Compensation and Classification Study for more than 800 employees and job classifications for all employees except teachers. The Evergreen Team conducted employee orientations, focus groups and interviews at multiple district locations, conducted job analyses of all included positions, conducted a comprehensive salary survey of the regional and statewide labor market peers, and provided detailed recommendations for adjusting the School District's pay and classification structure. The Evergreen Team also developed an implementation plan and cost plan, and conducted a staffing analysis of all central office functions, including a comprehensive survey of regional and statewide peer school districts, and made recommendations to adjust district staffing to achieve efficient and effective operations.



**Compensation and Classification Study
Brevard County Schools, Florida**

Evergreen Solutions was hired by Brevard Public Schools to conduct a Compensation and Classification Study including all non-bargaining positions, including creation of career ladders, and provide recommendations for implementation of a revised pay plan



for 730 employees. The study included all non-bargaining employees and classifications in the district. As part of the study, the Evergreen Solutions Team conducted orientations, focus groups, and interviews with employees, and collected Job Assessment Tools (JATs) from employees. Evergreen's consultants conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the district. Finally, Evergreen developed a detailed plan to provide BPS with specific steps to implement an equitable and competitive compensation plan.



**Comprehensive Compensation and Classification Study
St. Lucie County School District, Florida**

Evergreen Solutions conducted a Comprehensive Compensation and Classification Study for more than 1,000 employees of the School District of St. Lucie County. Special emphasis was being placed on the classification and compensation concerns of the Communication Workers of America, Classified Unit, and specialized personnel of the Classroom Teachers of America. Key work tasks included ensuring job tasks match job descriptions, ensuring internal equity exists within classifications, the District is paying at a level consistent with the marketplace, revising job descriptions and building a pay for performance system that is related to job descriptions. Evergreen provided customized and detailed recommendations for adjusting the District's compensation and classification structures and developed implementation options that are equitable and cost efficient.



**Classification and Compensation Study
Tuscaloosa City Schools, Alabama**

Evergreen was hired by Tuscaloosa City Schools (TCS) to conduct a Compensation and Classification Study for 1,400 employees. Employees participated in focus groups, interviews, and a job analysis to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Evergreen developed recommendations and guidelines for the continued administration and maintenance of the classification and compensation structure, including recommendations and guidelines related to: how employees would move through the pay structure/system as a result of transfers, promotions, or demotions; how to pay employees whose base pay had reached the maximum of their pay range or value of their



position; the proper mix of pay; how often to adjust pay scales and survey the market; the timing of implementation; and how to keep the system fair and competitive over time.

Evergreen also provided instructional information to allow TCS staff to conduct individual salary audits and adjustments consistent with study methods until the next formal study is conducted and developed a plan that would allow TCS to maintain recommendations over time.



**Salary Equity Study
Douglas Public Schools, Georgia**

The Douglas County School System retained Evergreen Solutions to conduct a Salary Equity Study of the school system's classified employees. The school system is located west of Metropolitan Atlanta and employs over 2,800 workers and serves approximately 22,000 students.

Evergreen's consultants assessed both internal and external equity of the County's compensation and classification plan, and provided recommendations for a new plan to cover employees. Evergreen Solutions provided Job Assessment Tool (JAT) completion support for several departments as part of the initial phase of the project. A market assessment was conducted taking into account local as well as regional peers to assess the current market position of the school system. Evergreen Solutions also utilized the JobForce Web module to provide the School System with comprehensive recommendations that moved the system to a more 21st century structure of human resource management.



**Comprehensive Compensation and Classification Study
Sumter County Schools, Georgia**

Evergreen Solutions was hired by Sumter County Schools to conduct a Comprehensive Compensation and Classification Study for all 856 employees and job classifications. The study included both instructional and non-instructional personnel. Although the study's primary emphasis was on ensuring that Sumter County Schools were compensating employees consistently with the market place, the study also ensured that employees were paid consistently with other classifications within the school district's internal structure. This study was the first significant study of its kind commissioned by



the school district and serves as the baseline for future compensation and classification management actions. Evergreen Solutions provided detailed recommendations for adjusting the school district's pay and classification structure and developed an implementation plan complete with costing information.



Human Resource Study Atlanta Public Schools, Georgia

The Atlanta Public Schools contracted with Evergreen Solutions to conduct a review of specific human resources policies within the school system. The policy review was confined to two specific policies— (1) the policy governing the hiring of personnel and crediting for years of service by hiring into the range of the position; and (2) the policy governing the promotion of staff and the upward grade and range movement awarded to employees within the school system upon promotion. In conducting this study for the school system, Evergreen was tasked with the following:

- analyzing the current hiring and promotion policies in place within APS as they relate to both certified staff (teachers and instructional personnel) and non-certified staff (administrative and classified personnel);
- obtaining anecdotal data on the strengths and weaknesses of the current policies from both human resources staff and employees within the school system;
- determining the market competitive position of these policies with larger districts within the Metropolitan Regional Education Service Agency;
- determining the competitiveness of these policies as compared to large, progressive, urban school systems throughout the United States;
- identifying a fair, practical, and fiscally responsible solution for the school system to amend their current hiring and promotion policies; and
- providing specific implementation recommendations for both the hiring and promotion policies within the Atlanta Public Schools.



**Market Salary Survey
Los Angeles Unified School District, California**

Evergreen Solutions was selected by the Los Angeles Unified School District (LAUSD), Office of the Inspector General (OIG) to conduct a comprehensive market survey to determine standard billing rates for construction management firms in the Los Angeles/Orange County area. The specific objective of the survey was to establish acceptable, competitive, and all inclusive billing rates for proposals received from interested construction and engineering firms in response to RFPs issued by LAUSD Facilities Contracts.

Evergreen initiated the project with a comprehensive assessment of the current economic environment in the Los Angeles area; results from previous surveys; and available historical data related to construction management billing rates. Based on the results of the analysis, Evergreen worked with the district to identify firms that should, and should not be included in the market study. The survey was sent to all applicable construction management firms that act in a prime contractor capacity and that were ready, willing, and able to provide services to LAUSD. From participating peers, Evergreen solicited information on salary levels, benefits offerings, rate increases, overhead attributed to specific positions, and a number of other factors.

Upon completing collection of market data, Evergreen conducted statistical analysis of the data to build a total compensation profile of the marketplace for each position and provided the OIG with billing rate recommendations to place LAUSD construction contractors competitively within the total compensation market. Results from the study were presented in a final report to the OIG.



**Compensation and Classification Study
Gadsden Independent School District (ISD), New Mexico**

Gadsden ISD contracted with Evergreen Solutions to conduct a Compensation and Classification Study for 180 employees to analyze and evaluate the competitive status of its compensation and classification system. Evergreen's consultants evaluated the present system, conducted on-site orientation sessions and focus groups with employees and managers to familiarize them with the project as well as gather their feedback on the system. Additionally, Evergreen's consultants met with senior managers and department heads to obtain their unique input as to the strengths and weakness of the system as it related to their specific area of expertise. Employees offered further feedback into the process by completing a Job Assessment Tool (JAT) allowing Evergreen's consultants to



evaluate the classification structure and determine how work within the District is organized and identify potential areas of internal inequity.

Evergreen's consultants then conducted a salary survey of peer organizations using representative benchmark classifications from the District and developed compensation and classification recommendations which addressed the issues uncovered through the analytical process and produced draft and final reports detailing the aforementioned recommendations.



Pay and Classification Study Albuquerque Public Schools, New Mexico

Evergreen Solutions was hired by Albuquerque Public Schools (APS) to assist in a review of Human Resources Department policies and procedures related to classification and compensation programs. The review included 635 non-union and non-instructional employees in 340 classifications. This study examined the APS existing salary schedules for the participating classifications as well as review the current compensation, education, and experience levels for internal and external equity. Evergreen made recommendations for salary schedules, ensured that all positions properly fell into one of the four non-union classifications, made recommendations for changes in compensation and pay, and developed a phased compensation implementation plan.



1.4 Proposed Project Team

The Evergreen Team has proven that we are able to work together efficiently and effectively to provide the best possible results to our clients, even in major pressure situations. Given our considerable K-12 experience, Evergreen Solutions has learned that the experience and expertise of the Project Director and Project Team are mainly responsible for a successful project. Our consultants have a clear understanding of information, milestones, and tasks that our school district clients will need, as well as the order in which these tasks must be performed to produce an excellent final report.

Consultant team members must be thoroughly knowledgeable in the portion of the project they are responsible for, as well as have expertise in the issues that are unique to each individual school district. Evergreen Solutions is proposing an exceptional team of experts who have worked together on many similar engagements.



Evergreen Solutions always ensures that each project is sufficiently staffed to handle any additional tasks or unforeseen issues that may arise during the course of the study. The combination of our individual knowledge and skills form a superior team that will be able to competently perform all aspects of the Operational Review of Ipswich Public Schools for the Town of Ipswich.

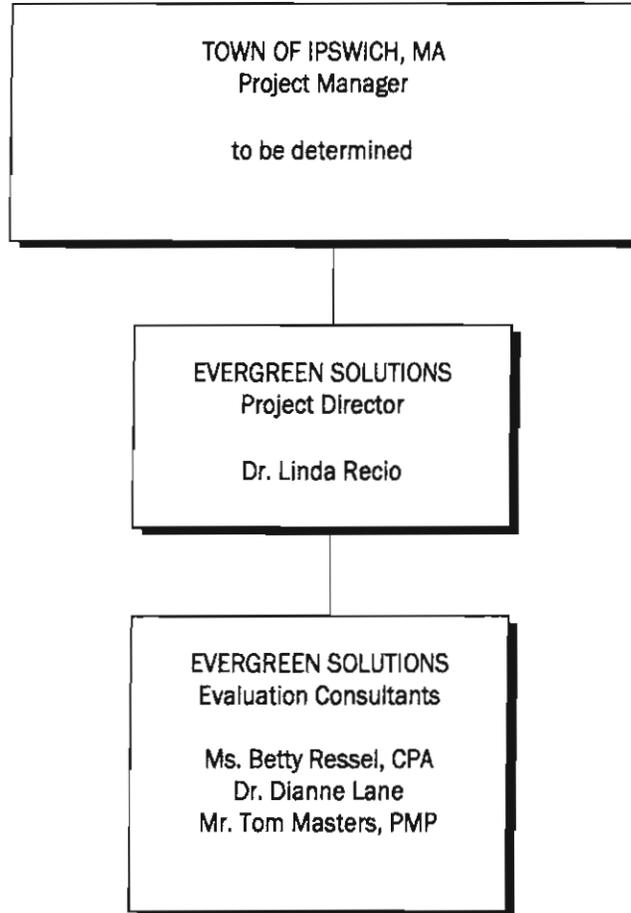
The Evergreen Team's strengths include:

- **We build a team specific to your project.** We always put consultants on a project who are experts in the particular area being evaluated. We are proposing a team of experts who together possess well over 75 years of combined experience in conducting operational reviews.
- **We work well together.** Evergreen offers the Town of Ipswich a team of consultants who have worked on many similar projects together and as such, understand the importance of maintaining continuity throughout the project by working as a unified team.
- **We are flexible.** Evergreen consultants are always willing to discuss the timelines, the scope, and the cost of our project as we want our clients to be completely satisfied.
- **We are unbiased.** We have objectivity due to the fact that we have no vested interest in the project outcome.
- **We never overwork our consultants.** We pride ourselves on providing continuity of service throughout the duration of any project we are on contract to complete. Our workload is never too heavy so as to compromise the quality of any project we are on contract to complete or place undue stress on any member of the project team. Our consultants are dedicated to putting the necessary time and effort into every project to make sure all required tasks and activities are delivered within specified time frames.
- **We develop a close partnership with our clients.** We develop a close partnership with every client which promotes effective communication and a spirit of collaboration that ultimately improves project outcomes and results.

Exhibit 1-2 shows our proposed project management organization and proposed personnel assignments for conducting the Operational Review of Ipswich Public Schools for the Town of Ipswich. The structure is designed to identify roles and responsibilities of each team member so that there will be no confusion as to who is responsible for any aspect of the operational review.



Exhibit 1-2
Proposed
Organizational
Structure and
Personnel
Assignments



Key Team
Members

The following paragraphs provide biographical summaries of each team member's qualifications related to this engagement. Detailed resumes are available upon request.

Project Director
Dr. Linda Recio

Dr. Linda Recio will serve as the **Project Director** as she has directed more than 150 operational, performance, and efficiency reviews/audits for school districts in Massachusetts, Connecticut, Minnesota, Pennsylvania, Ohio, Florida, Virginia, South Carolina, North Carolina, Texas, California, Washington, Oklahoma, and several other states, as well as the territory of Guam. She is the President of Evergreen Solutions, and has over 30 years of experience in public education as a classroom teacher, teacher educator, school district administrator, and director of state educational programs.

*30 Years Experience in
Conducting School
District Management
Reviews.*



*Primary Author of
Evergreen's
Procedures for
Conducting
Operational and
Performance Reviews
of School Districts and
Best Practices School
District Manual.*

*Former School District
Assistant
Superintendent, State
Agency Administrator,
and Classroom
Teacher.*

Early in her career, after serving as a middle school teacher, Dr. Recio worked as a consultant with the Florida Department of Education. While at the Department of Education, she was instrumental in developing the comprehensive audit criteria and data collection instruments utilized for conducting operational and performance reviews in Florida's 67 school districts. Following the development of the audit criteria, she served as team leader for audits that involved examining and evaluating procedures, records, and programs to determine compliance with federal, state, and local rules and regulations; providing assistance to the district administration in correcting deficiencies; and assisting school districts in operating efficiently and effectively. She conducted audits in Florida's 67 school districts including audits of Florida's large school districts of Miami-Dade, Broward, Duval and Palm Beach County.

Following a 14-year career with the Department of Education, Dr. Recio joined the Leon County School System as an Assistant Superintendent where she was responsible for the district's strategic plan, school board policies and administrative procedures, staff plan, interagency and legislative planning, grants administration, and program evaluation

For 15 years Dr. Recio was in charge of K-12 education, strategic planning, and marketing as a Senior Partner with MGT of America, a national consulting firm.

Since joining Evergreen Solutions, LLC as its president in 2005, Dr. Recio has served hundreds of clients including the school districts of:

- **Hamilton-Wenham School District (Massachusetts).** Dr. Recio was the Project Director of an external review of the efficiency of various departments and operations within the Hamilton-Wenham Regional School District. A final report of the findings, commendations, recommendations and projected costs and/or cost savings associated with the recommendations was presented to the Town of Hamilton.
- **Needham Public Schools (Massachusetts).** Dr. Recio was the Project Director for a comprehensive School Department Operations and Staffing Study of the non-instructional support functions of Needham Public Schools.
- **Toledo Public Schools (Ohio).** Dr. Recio was the Project Director a Performance Audit of District Operations in Toledo Public Schools. The 90-day Performance Audit included a comprehensive review of central office management; human resources and personnel management; curriculum and instruction; facilities use and management; financial management; transportation; food services; technology; and safety and security.



-
- **Los Angeles Unified School District (California).** The Los Angeles District has 740,000 students and is the second largest district in the nation. Dr. Recio directed a Phase I District Performance Review whose purpose was to review all past independent audits in every operational area to provide the framework of a cohesive, integrated, forward-looking performance review action plan. The review team studied the most significant audits, reports, and studies on the district's organizational performance and assessed what was implemented, what was not, and the reasons why. The team then developed a prioritized list of operational areas for deeper review as part of Phase II. The Phase II projects consisted of comprehensive studies in the area of payroll, finance, organization, governance, accountability, instructional programs, safety, and security. She also served as project director for the Evergreen Solutions review of the Los Angeles Unified School District Food Services Branch, Study of Parental Engagement, and monitored the implementation of the 100 recommendations of the Finance Study from Phase II.
 - **School District of Philadelphia (Pennsylvania).** With 190,000 students, Philadelphia is the eighth largest school district in the nation. Dr. Recio directed a team of more than 20 consultants to complete an Organizational and Operational Review of the district. The team reviewed 12 different areas, including financial/fiscal management, administrative management, and delivery of all services not tied directly to academics.
 - **Richland County School District Two (South Carolina).** Dr. Recio directed an organizational effectiveness and efficiency audit of operational and instructional services in the Richland Two School District. The review included an analysis of programs and operations as well as employee surveys and benchmarking against comparison school districts. The areas reviewed included: District Administration; Instruction; Finance; Personnel and Human Resources Management; Facilities; Technology Management; Transportation; and Safety and Security.

Dr. Recio is the primary author of the Evergreen Solutions Procedures for Conducting Operational and Performance Reviews of School Districts, as well as Evergreen's Best Practices School District Manual. In addition, she has developed school district performance audit guidelines manuals for several states including the state of Washington, where Evergreen Solutions conducted performance reviews of the 10 largest school districts in the state. Her broad experiences will enable her to contribute significantly as the Project Director for the Operational Review of Ipswich Public Schools for the Town of Ipswich.



**Project Consultant
Ms. Betty Ressel,
CPA**

***Certified Public
Accountant with
Extensive Knowledge
of School Funding,
Fiscal/Operational
Management, and
School District
Investments.***

***Participated in and
Managed more than
100 Texas School
District Operational
Reviews.***

Ms. Betty Ressel, CPA, is a Managing Partner of Ressel and Associates, LLC, located in Austin Texas. She has participated in and managed 105 operational, efficiency, and performance audits conducted by the Texas Comptroller's Office in school districts (100) and Higher Education Institutions (5), as well as reviews of state and local governmental agencies.

From 1993 to 2003, Ms. Ressel served as the Director of the Texas School Performance Review (TSPR). As one of her first acts in that position, she envisioned and implemented several unique components to the reviews, including documented audit protocols and follow-up progress visits. While the notion of operational audits was not new at that time, there were no documented processes or standards for conducting such reviews. The TSPR audit protocols for school districts and higher education institutions, which she authored and disseminated nationally after winning the 1999 Innovations in American Government Award, are now continually under reviewed and improved to ensure consistency of approach relevancy when conducting a school review.

With Evergreen Ms. Ressel has served on the Team for the following studies: a Performance Audit of District Operations for Toledo Public Schools, OH; an Organizational, Efficiency, and Effectiveness Study for Manchester Public Schools, CT; a Feasibility Study for the consolidation of school systems within the County of Halifax, North Carolina; a survey of Standard Billing Rates for Construction Management Firms for the Los Angeles Unified School District, CA; an evaluation of the Race to the Top Grant program for the Florida Department of Education; a Performance Audit for Lee County and a Financial Review for Lee County Public Schools, NC; a Performance Audit Davie and Duplin County Governments, and a Financial Review of Davie and Duplin County Public Schools, NC; a Performance Audit of the Health Department for Yadkin County, NC; an Organizational Effectiveness and Efficiency Audit for the Richland Two School District, SC; and a Classification and Compensation Study for the Lone Star College System, TX.

In addition to directing management and efficiency reviews, Ms. Ressel has personally gathered data for the audits in each of the functional areas, administered surveys, conducted interviews as well as small and large group facilitated sessions as part of the review process, formulated fully supported recommendations and commendations, and has written and edited entire reports.

In the area of school governance, Ms. Ressel has practical experience with policy governance models and has worked with a number of public and private school boards in creating and modifying strategic plans, policies, and procedures. She understands the unique safety and security issues associated with schools and school-based activities, and has examined the effectiveness of school-based safety and security organizations and related policies and practices. Based on years of experience, she



prepared recommendations for the Comptroller and authored a white paper entitled Keeping Texas Children Safe in School, outlining exemplary prevention, intervention and enforcement activities collected in past reviews of school districts across Texas.

As a former personnel manager and the director of several large divisions within a Texas state agency, Ms. Ressel also understands state and federal laws related to managing human resources. She strongly believes in the need for clear and accessible internal policies and procedures to guide management and staff through the process. She has developed flexible staffing allocation formulas that take into account the needs of small and large school districts and other state and local governmental entities and has first-hand experience working with contracts and contract employees.

Ms. Ressel is a Certified Public Accountant with extensive knowledge of school funding, financial management and school district investments. At the request of the Texas Legislature, she collaborated with a task force to write an investment and cash management guide, Banks to Bonds: A Practical Path to Sound School District Investing. In addition to her hands-on experience working with Texas public schools, she is also the primary author of a number of white papers that discuss best practices identified for the management of public school support functions such as: Top Ten Ways to Improve Public Schools; Keeping Texas Children Safe in School; Food for Thought: Ideas for Improving Food Service Operations; Helping Schools Make Technology Work: Managing Information Technology From Classrooms to Lunchrooms; Navigating the Legal Maze; and, Balancing the Budget-101 Ideas for Cutting Costs and Maximizing Revenues.



**Project Consultant
Dr. Dianne Lane**

***Former School District
Superintendent,
School Board Member,
and Teacher.***

***Conducted School
District Management
Reviews for more than
15 Years.***

As a consultant with Evergreen Solutions, **Dr. Dianne Lane** has worked in the large school districts of Raleigh, Los Angeles, Philadelphia, and the ten largest districts in the state of Washington providing diagnostic services and reviews of organizational and management practices of educational systems, their programs and policies, and operations at the school district, and central administrative management levels. She has conducted extensive analysis of curricular and instructional delivery systems for all programs, including Exceptional Student Education (ESE) and English as a Second Language (ESL). She has conducted school district efficiency reviews for over 10 years.

In Los Angeles, Dr. Lane led a team of seven consultants examining all facets of curriculum and instruction in the more than 700,000 student school district. The process involved analyzing relevant district data and documents, comparing LAUSD with peer districts/state/national data, identifying key players who can



***Expert in Analyzing
Curricular and
Instructional Program
Delivery Systems.***

contribute to substantive findings and recommendations, conducting onsite structured interviews with appropriate informants, and distilling findings into recommendations with suggested time lines and responsible personnel. Analyses included transitional processes among grades and schools; alignment of curriculum across grades, programs, and content areas; instructional practices that affect the learning of all students; professional development to determine teachers' knowledge; practice of inclusion and differentiation and co-teaching strategies; and transportation, school, and program configurations; and policies to ensure access to Least Restrictive Environments. The work products also identified best practices to build on, suggested implementation strategies, and recommended best practices and tools gleaned from across the country related to the findings and recommendations.

As Superintendent of Schools in a rural Florida district, Dr. Lane pioneered improvement efforts in her district, building a strong foundation for school reform through the commitment of staff and leaders. After eight years in that position, she was selected as the liaison between the Florida Department of Education (FDOE) and the lowest performing school district in Florida, Gadsden County. The majority of Gadsden County's schools (80% Black, 15% Hispanic, all Title I) had earned Ds and Fs. Her charge was to assist the district in increasing its focus on student achievement.

In addition, Dr. Lane served as the team leader for evaluation of the state's process for school improvement. Her responsibilities included development of evaluative instruments for the collection of quantitative and qualitative data, conducting observations and interviews, disseminating and compiling data from surveys, and writing the final report. She was also responsible for initiation and management of a statewide task force for planning and feedback regarding training and awareness activities.

After completion of the waiver study, Dr. Lane worked at the Florida Institute of Education as a liaison between the Department of Education's Division of Public Schools, superintendents, and other educational leaders, marketing the resources and technical assistance available at the department to superintendents and their staffs and serving as a communication link with the Director of the Division. Her job was to identify resources and proven and promising practices for sharing among educators across the state, create cohesive communication channels among superintendents with common challenges, and to work with decision-makers in the Department of Education to develop solutions.

Dr. Lane has worked with school and district leaders in numerous states to involve all school staff in learning about and applying school effectiveness research to local challenges; equipping staff members to analyze data to identify causes, rather than symptoms; locate pertinent best practices and research; and devise intervention strategies to create an infrastructure that supports



continuous improvement within which student achievement for all students increases. She also works with staff to find and procure external resources to support those efforts. Topics at annual conferences she has organized for participating schools include: differentiated instruction, data-driven decision making, the linkage between parent involvement and student achievement, and proactive classroom management.

Dr. Lane has also worked to create a National Alliance for Effective Schools with Center Directors across the nation to collaborate and maximize the strengths of each, and promote the use of research on "What Works" in schools as a solid foundation for school reform, especially in low performing schools. Recognizing the importance of equitable treatment by teachers for all students, she is a certified trainer in the research-based Teacher Expectation Student Achievement (TESA) program.

As Director of the Southeast Center for Effective Schools, Dr. Lane has worked with districts on issues such as a complete reconfiguration of one district's schools from curriculum to communications and provisions for students at risk of failing; using Effective Schools research as a filter for decision making; alignment of instruction in all programs; recruitment and retention of teachers and administrators; evaluation and restructuring of before and after school programs to incorporate research on best practices; parent and community involvement, integration of career education into academic courses K-12; and grant writing.



Project Consultant
Mr. Tom Masters,
PMP

*Certified Project
Management
Professional.*

*Expert in Data
Collection and
Analysis.*

Mr. Tom Masters, a Manager at Evergreen Solutions, has unique skills and knowledge of management reviews that stem from his background in Business Management and Management Information Systems. He has specific experience with quantitative and qualitative data collection methods, and disseminating large amounts of data. While at Evergreen he has participated in a number of academic, organizational, management, and efficiency reviews across the country.

Mr. Masters' specific experience is with data collection and analysis for public sector organizations—primarily school districts, colleges and universities, and local and state governments. Having participated in Evergreen's review process many times, he has a thorough understanding of the entire process, and is well versed on the various tools and methodology used to complete such projects. He understands the dynamics and variations that exist in public sector organizations and is uniquely qualified to provide specialized research and analysis for project teams.



The multitude of studies that Mr. Masters has participated in are diverse in nature, but gravitate around education. A sample of some of the education engagements in which he has been involved include:

- **Hamilton-Wenham Regional School District (HWRSD), Massachusetts** – He participated on the Evergreen Team for an operational audit of HWRSD by conducting a comprehensive review of various departments and operations within the district.
- **Manchester Public Schools, Connecticut** - He participated on the project team for an organizational effectiveness and efficiency study of the district by reviewing the operation of central office and business operations (i.e., human resources, payroll, purchasing, accounts payable, and budget).
- **Toledo Public Schools, Ohio**– He is participating on the Evergreen Team for a Performance Audit of Toledo Public Schools by conducting a comprehensive review of various operations, including curriculum and instruction, within the district.
- **Evaluation of the Race to the Top Grant Program for the Florida Department of Education.** He is currently serving on the project team to conduct a state-wide evaluation of Florida's Race to the Top Grant program.
- **Performance Review of the Duplin County School System, North Carolina.** He worked on the project team to assess the organization and management of a number of departments; including, but not limited to the human resources, food service, transportation, and facilities functions. The study concluded with an identification of over \$6 million dollars in cost savings for the Duplin County School System.

During most of the education projects that Mr. Masters has been involved with, he has been responsible for conducting a detailed analysis of all of the client's management functions, including but not limited to payroll, internal allocation of resources, internal controls, impact of federal and state reporting requirements, discretionary spending, use of technology, use of grant funds, procurement, travel expenditures, internal policies and procedures, and adherence to state level protocol. He is versed with the management tools that exist to improve operations of public sector organizations and has experience with using findings to implement change.

Mr. Masters has a Bachelor's Degree in Business Management and a Master's Degree in Management Information Systems. He holds a Project Management Professional (PMP) certification.



Chapter 2

Detailed Methodology



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2.0 Detailed Methodology

This chapter provides Evergreen's approach for conducting the Operational Review of Ipswich Public Schools (IPS) for the Town of Ipswich (Town), Massachusetts, under direction of the Town's Ad Hoc Audit Committee (Committee). We include our understanding of the scope of work, our methodology and tools, a detailed work plan, and our proposed project schedule.

This chapter is organized into the following four sections:

- 2.1 Scope of Work
- 2.2 Methodology and Tools
- 2.3 Detailed Work Plan
- 2.4 Proposed Project Schedule

2.1 Scope of Work

The Request for Proposal (RFP) for the Operational Review of Ipswich Public Schools contains several requirements. As stated, the purpose of the review is to examine "the adequacy of the educational and non-educational services delivered and the efficiency with which they are delivered and supported, and to identify short- and long- term costs that should be expended and/or savings that can be gained through the implementation of best practices, including potential collaboration with other municipal departments."

Specifically, the scope of work calls for review of following eleven areas:

1. **Salaries and Staffing** - To include review of all salaries for reasonableness as compared to peer communities including: teachers, clerical, teacher assistants, athletic coaching and administrators, including the Superintendent. To include review for reasonableness, as compared to peer communities and considering existing student enrollment, of staffing levels at each school (administrative, teaching within each subject area, nursing & custodial) and the Central office.
2. **Curriculum Management** - Consider the cost and effectiveness of existing curriculum management practices and compare with those of peer communities. Review for adequacy of instruction facilities, tools and training and adequacy of class offerings as compared to peer communities. To include curriculum coordinator vs curriculum teams (Ipswich model), keeping textbooks current, cost and methods for curriculum development at each level. To include the cost and effectiveness of current student class schedules vs potential alternative scheduling systems, also considering time allotted to core subject areas (science, math, language arts, social studies, foreign language) vs non-core areas (physical education, fine arts, performing arts, etc.). Evaluate if athletic and fine arts offerings are reasonable as compared to peer communities.



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3. **Information Technology (IT)** – Using Feoffee grant monies, the Ipswich Public Schools is currently investing in new IT network infrastructures including classroom September 3, 2014 7 | Page technology at all school buildings. Evaluate current staffing levels, policies and procedures in relation to current MA public school standards including refresh rates to properly maintain or timely replace equipment. Include collaboration opportunities with Town or Town utility IT departments.
 4. **Purchasing** - To evaluate that state purchasing policies are being followed. To include review of purchasing practices to determine if purchases are consolidated within each school, among schools and between schools, and with municipal to minimize multiple purchases of the same item and to obtain best pricing. To determine that policies and practices are in place to minimize waste/losses.
 5. **Transportation** - To include review of regular and special education transportation costs for reasonableness and comparison with peer communities.
 6. **Collaboration** - Based on knowledge of other similar towns and school districts, identify areas where greater collaboration within and between schools or between schools and municipal would yield significant cost savings. Consider such areas as IT, payroll, HR, Purchasing, and field maintenance.
 7. **Elementary grade configuration** - Review the enrollments, grade configurations, staffing, administrative and support staff of Doyon and Winthrop elementary schools and report on the potential cost savings and the pros and cons of consolidating Pre- K to grade 2 into one school and grade 3 to 5 into the other. Or any other grade consolidation configuration that would generate program efficiencies and cost savings. Consider the impact of any proposed changes on increased transportation costs and the possible loss of Title 1 funding.
 8. **Outside funding** - Compare the Ipswich Public School's outside funding levels compare reasonably with peer communities. Evaluate if a part time grant writer would increase federal, state and/or private grants sufficiently to justify the salary of a part time grant writer. Evaluate the school's cost structure for school facility use by outside groups, and determine if the fees are being charged equally to all groups. Provide benchmarks to peer group for student user fees including but not limited to after school activities, athletics, bussing, parking and lunch fees.
 9. **Professional development** - Evaluate professional development funding and compare with peer communities.



10. Purchased Services - Are outside purchased services such as legal, grounds & buildings maintenance, security & virtual high school reasonable and are these services being procured using best practices, policies and procedures. Compare expenses comparable with peer communities.

11. Feoffee funding - Ipswich receives an annual distribution from a Feoffee Trust. Given school policy and the court settlement agreement that defined the terms of the Trust, is Ipswich allocating these funds in a reasonable manner given the needs of the school system.

In addition, the RFP states that the selected consultant will “create, with the Committee’s input, a peer group of 10 to 12 communities to be used for the audit comparisons. The peer group list shall be comprised of a combination of DESE provided peer communities and local communities that match Ipswich’s profile in resident and student population, economic factors including income and housing values.”

With a clear understanding of the above scope of work, we provide our methodology and work plan to conduct the Operational Review of Ipswich Public Schools in the next sections of this chapter.

2.2 Methodology and Tools

In this section of our proposal, we describe the methodology and tools that Evergreen will use to plan, manage, and implement the Operational Review of Ipswich Public Schools (IPS). Our methodology and tools have been expanded and improved over time based on our extensive experience in conducting operational reviews in school districts throughout the country.

2.2.1 Methodology

Project Management - Our methodology for project management is rigorous. As a first task, we will meet with the Town of Ipswich (Town) Project Manager to ensure that our detailed work plan included in this proposal meets the standards and requirements set by the Town’s Ad Hoc Audit Committee (Committee). Following any modifications, our work plan becomes our blueprint and the vehicle for the Committee to monitor our work, and for Evergreen’s Project Director to manage the project.

An integral part of Project Management is to train all team members to ensure that our consultants are thoroughly familiar with our detailed work plan and background information on IPS.

Project Management also includes:

- Regular communication by Evergreen’s Project Director with the Town Project Manager and Committee.



-
- Regular (weekly) progress reports to the Project Manager and Committee on the schedule confirmed at the start of the project.
 - On-time development and submission of all project deliverables, including research, comparative data analysis, survey analysis, and reports.

Project Organization – Responsibilities for all components of the Operational Review will be assigned at the initiation of the project so that each team member knows what he/she is responsible for. In addition, quality control will be maintained. No deliverable will be sent to the Committee until they are thoroughly reviewed by Evergreen's Project Director. The internal timeline established by Evergreen's Project Director will ensure that this secondary review will be accomplished without a delay in the deliverable due date to our client.

Data Collection and Analysis – An important part of our methodology is data collection and analysis. During the project initiation phase, Evergreen's Project Director will provide the Town Project Manager with a comprehensive initial data request list consisting of over 150 items for the completion of the Operational Review. Data will be requested for each of the operational areas identified in the RFP. Many of the items on this list are readily available in school districts, or have already been identified in the RFP as being provided upon contract execution. As part of our initial project activities, this data request list will be cataloged, monitored, and disseminated to Evergreen team members for analysis. Evergreen team members will review and analyze these data prior to and in preparation for on-site work.

Data analysis will provide meaningful input into the questions asked by each team member while on-site. Data analysis will also lead to the generation of a list of additional information needed by a team member.

Stakeholder Input – Both internal and external stakeholder input is a critical component of our methodology. We will use various vehicles to generate stakeholder input to ensure that Town residents, the Committee, IPS employees, students, parents, and Ipswich community leaders have sufficient access to our consultant team. These vehicles include, but are not limited to:

- the creation of a website location for stakeholders to provide comments, concerns, and input into the Operational Review;
- the use of tested surveys which will be benchmarked to Evergreen's survey results in other school districts;
- meaningful interviews and focus groups;



-
- one or more public meetings; and
 - dissemination of Evergreen’s email addresses, fax number, and mailing address to stakeholders.

Benchmarking – Benchmarking can be described as a process which is modeled on the human learning. A good working definition is, “the process of identifying, learning, and adapting outstanding practices and processed from any organization, anywhere in the world, to help an organization improve its performance.” The underlying rationale for the benchmarking process is that learning by example, for best practice cases, is the most effective means of understanding the principles and the specifics of effective practices.

The most important aspects of benchmarking are two-fold:

- **First**, it is not a fixed technique, but rather a process driven by the participants who are trying to change their organization.
- **Second**, it does not use prescribed solutions to a problem, but is a process through which participants learn about successful practices in other organizations and then draw on those cases to develop solutions that are most suitable for their own organizations.

Benchmarking is not simply a comparison of numbers or performance statistics. While numbers are helpful for identifying gaps in performance, true process benchmarking identifies the “hows” and “whys” for performance gaps, and helps school districts learn and understand how to perform at higher levels.

Through the years, Evergreen consultants have expanded the knowledge and use of benchmarking as an important component of our methodology so that effective management and organizational practices of top-performing districts can be documented and other districts can emulate and utilize these practices. As such, we use established key performance measures in most operational areas to assess performance during the Operational Review.

For example, in the area of transportation, key performance indicators (KPIs) include, but are not limited to:

- cost per student transported;
- percent of students transported;
- average number of routes per bus;
- average age of bus fleet;
- cost per district-operated fleet; and
- drivers per bus.



Operational definitions of each KPI, as well as best practices, are contained in Evergreen's School District Best Practices Manual. This manual is regularly updated.

Team Collaboration - Our methodology includes extensive team collaboration—both prior to, during, and after the on-site phase of our study.

- Prior to the on-site review, the Evergreen Team will meet to discuss the results of the diagnostic review for each operational area so that team members are briefed.
- On the night before commencement of the on-site work, our Team will gather for orientation, including a review of schedules, logistical information, comparative analysis review, and data analyses.
- Each night during the on-site review, the Evergreen Team will meet to discuss key findings by operational area as well as cross-cutting issues. For example, if our transportation consultant finds a purchasing concern both the financial consultant and transportation consultant will discuss and address the issue.
- Following the on-site review, the Project Director will schedule a weekly team conference call to focus on preliminary recommendations and to ensure there are no conflicts nor duplicate recommendations. Commendable practices are identified and discussed as well.

2.2.2 Tools

Evergreen Solutions has several tools which we will use to plan and manage this Operational Review. Evergreen's professional consultants have developed contemporary methodologies and tools to best meet our client needs. These include:

- Operational Review Procedures
- Best Practices Database
- Surveys
- Survey Benchmark Database
- Interview Guides/Questionnaires

Each of these will be described separately below.

- **Operational Review Procedures** - Evergreen Solutions has developed a 100-page document entitled "Procedures for Conducting School District Management and Operational Reviews," **Exhibit 2-1** shows the outline of this manual. A complete copy of this document is available upon request.



**Exhibit 2-1
Evergreen's
Operational Review
Study Procedures**

- 1.0 District Organization and Management
 - 1.1 Governance (School Committee Issues)
 - 1.2 Policies and Procedures
 - 1.3 District Organization and Management
 - 1.4 School Management
 - 1.5 School Improvement
 - 1.6 Legal Services
 - 1.7 Strategic Planning and Budgeting
- 2.0 Educational Service Delivery
 - 2.1 Instructional Organization and Management
 - 2.2 Curriculum and Instruction
 - 2.3 Student Performance
 - 2.4 Special Education
 - 2.5 Student Services
 - 2.6 Program Evaluation
 - 2.7 Instructional Technology
- 3.0 Human Resources and Personnel Management
 - 3.1 Organization and Management
 - 3.2 Policies and Procedures
 - 3.3 Personnel Records
 - 3.4 Hiring of Personnel
 - 3.5 Recruitment and Retention
 - 3.6 Compensation and Classification
 - 3.7 Performance Assessment
 - 3.8 Professional Development
 - 3.9 Labor and Employee Relations
 - 3.10 Employee Benefits
- 4.0 Community Involvement/Public Relations
 - 4.1 Organization and Management
 - 4.2 Community/Business Partnership
 - 4.3 Parent Involvement
 - 4.4 Volunteer Programs
 - 4.5 Education Foundations
 - 4.6 Communications/Public Relations
- 5.0 Facilities Use and Management
 - 5.1 Facilities Management and Organization
 - 5.2 Facilities Planning, Policies, and Procedures
 - 5.3 Facilities Construction Management
 - 5.4 Facilities Maintenance
 - 5.5 Custodial Operations
 - 5.6 Energy Management



**Exhibit 2-1
Evergreen's
Operational
Review Study
Procedures**

- 6.0 Financial Management
 - 6.1 Financial Organization and Management
 - 6.2 Financial Performance
 - 6.3 Planning and Budgeting
 - 6.4 Internal and External Auditing
 - 6.5 Asset and Risk Management
 - 6.6 Purchasing, Contracting, and Warehouse
- 7.0 Transportation
 - 7.1 Organization and Staffing
 - 7.2 Transportation Planning, Policies, and Procedures
 - 7.3 Routing and Scheduling
 - 7.4 Training and Safety
 - 7.5 Vehicle Maintenance and Fuel Usage
 - 7.6 Non-Bus Fleet
- 8.0 Food Services
 - 8.1 Organization and Staffing
 - 8.2 Policies, Procedures, and Compliance
 - 8.3 Facilities and Equipment
 - 8.4 Student Meal Participation
 - 8.5 Financial Performance
- 9.0 Technology
 - 9.1 Organization and Staffing
 - 9.2 Technology Planning and Budgeting
 - 9.3 Technology Policies and Procedures
 - 9.4 Inventory and Control
 - 9.5 Technology Acquisition Practices
 - 9.6 System Infrastructure and Integration
 - 9.7 Technology Support
 - 9.8 Technology Staff Development
- 10.0 Safety and Security
 - 10.1 Organization and Staffing
 - 10.2 Emergency Planning, Training, and Preparedness
 - 10.3 Security Operations
 - 10.4 Safety Measures
 - 10.5 Student Discipline
 - 10.6 Alternative Education



The procedures contained in the manual were derived from many sources, including guidelines used by the states of Texas, Florida, Oklahoma, and Virginia for their state school performance review programs; the knowledge and expertise of Evergreen consultants who have conducted over 150 Operational Reviews in school districts in many different states; and best practices and benchmarking techniques used by exemplary school districts throughout the country.

- **Best Practices Database** – Evergreen Solutions, LLC has several best practices databases—not only our own, but also those used by accrediting associations the professional associations (i.e., superintendents' associations, school boards' associations, guidance counselors associations, International Society for Technology in Education etc.).

These databases are electronic and will be available to all of our consulting team members. As stated previously, Evergreen has benchmarking techniques that will be used as part of this study with comparison peer communities. Our network of contacts throughout the country will facilitate our use of these techniques.

- **Surveys** – Evergreen has a bank of survey items for central office administrators, principals, and teachers which are used to obtain each group's perceptions of school district operations. Because of the use of similar survey items, the perceptions of the three groups can be compared. Evergreen Solutions surveys are available for completion in electronic or manual formats.
- **Survey Benchmark Database** – Evergreen maintains a database of responses of central office administrators, principals, and teachers where similar survey items have been used. Therefore, we offer to our clients a comparison of the perceptions of these three groups of employees in the school district under review to the average score of the perceptions in other school districts where similar survey items have been used.
- **Interview and Focus Group Guides/Self-Assessment Tools**– Evergreen has interview and focus group guides for its review of all operations in a school district. These were developed from the Evergreen Solutions guidelines and procedures used for conducting Operational Reviews in school districts.

In addition, Evergreen has developed self-assessment instruments for department directors to assess their individual unit operations. These are frequently used during the diagnostic phase of a study.



2.3 Detailed Work Plan

- **Video/Teleconferencing** - Each of Evergreen's team members is equipped with the technology necessary to conduct virtual conferencing. This allows us to conduct more personal "face-to-face" meetings when onsite meetings are not feasible or scheduled as well as keep costs down and pass this cost saving on to our client.
- **Online Workspace** - At the beginning of each project, Evergreen launches a secure online workspace using a Sharepoint website. This site is used by Evergreen to manage and track project implementation, store project documents and data, and facilitate communication. Access to this site is also available to the Town Project Manager or Committee members if desired, and can act as a median between Evergreen and the Town Project Manager/Committee members for documents exchange and project tracking. This site also houses the tools and reports developed as the review progresses.
- **Software** - In addition to standard software tools, Evergreen's Evaluation Toolset includes the following software to assist with and or conduct various evaluation/review activities:
 - **MS Access** - for synthesis of large data sets;
 - **MS Sharepoint** - for creating online workspaces;
 - **MS Project** - for planning and monitoring and controlling projects;
 - **SPSS** - for advanced statistical analysis;
 - **Questionpro** - for online survey development and administration; and
 - **Adobe Creative Suite** - for development of report and presentation graphics.

In this section, we provide our detailed plan for accomplishing the work being requested in the RFP. As illustrated in **Exhibit 2-2**, we are proposing a detailed work plan for the Operational Review consisting of the following four study phases and 15 tasks:

- Phase I: Project Initiation (Tasks 1 and 2)
- Phase II: Diagnostic Review (Tasks 3 - 5)
- Phase III: Comprehensive Operational Review (Tasks 6 - 14)
- Phase IV: Project Reporting (Task 15)



Exhibit 2-2

Outline of Evergreen's Work Plan for the IPS Operational Review

<p>Phase I: Project Initiation</p>	<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 1: Initiate Project</p> </div> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 60%; text-align: center;"> <p>TASK 2: Develop Preliminary Profile of Ipswich Public Schools</p> </div> </div>
<p>Phase II: Diagnostic Review</p>	<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 3: Conduct Diagnostic Review of Operations</p> </div> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 4: Conduct Surveys of Central Office Administrators, Principals, and Teachers</p> </div> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 5: Conduct Benchmarking and Best Practices Review</p> </div> </div>
<p>Phase III: Comprehensive Operational Review</p>	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="display: flex; justify-content: space-around; width: 100%;"> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 6: Review Salaries and Staffing</p> </div> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 7: Review Curriculum Management</p> </div> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 8: Review Information Technology</p> </div> </div> <div style="display: flex; justify-content: space-around; width: 100%; margin-top: 20px;"> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 9: Review Purchasing and Purchased Services</p> </div> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 10: Review Transportation</p> </div> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 11: Review Elementary Grade Configurations</p> </div> </div> <div style="display: flex; justify-content: space-around; width: 100%; margin-top: 20px;"> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 12: Review Outside Funding and Fee Funding</p> </div> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 13: Review Professional Development</p> </div> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 30%; text-align: center;"> <p>TASK 14: Review Collaboration</p> </div> </div> </div>
<p>Phase IV: Project Reporting</p>	<div style="border: 1px solid black; border-radius: 15px; padding: 10px; width: 80%; margin: auto; text-align: center;"> <p>TASK 15: Prepare Draft and Final Reports</p> </div>



PHASE I PROJECT INITIATION

Task 1.0: Initiate Project

TASK GOALS

- Finalize project work plan, time lines, and deliverables that will lead to the successful accomplishment of all objectives of the Operational Review.
- Review existing studies, reports, and databases of Ipswich Public Schools (IPS).
- Obtain district, state, and national comparative data as available from the Massachusetts Department of Education, the National Center for Education Statistics, and other sources.
- Make changes in the work plan, time lines, or deliverables, as requested by the Town Project Manager or other officials.
- Commence weekly progress reports.

TASK ACTIVITIES

- 1.1 Schedule a meeting with the Town Project Manager to review project goals and finalize contract.
- 1.2 Establish lines of communication and review the objectives for the Operational Review.
- 1.3 Meet with Town Project Manager and IPS officials to make arrangements for the Operational Review and to set up the calendar for on-site activities.
- 1.4 Obtain information related to the Operational Review from Ipswich Public Schools.
- 1.5 Obtain information from the Massachusetts Department of Education such as:
 - comparison data on operational functions; and
 - electronic data in state databases.
- 1.6 Obtain data on student achievement, revenues and expenditures, staffing, etc., from the district, state, and national sources.
- 1.7 Revise the work plan and the time lines for the Operational Review. Disseminate revised work plan.



**Task 2.0:
Develop Preliminary
Profile of Ipswich
Public Schools**

1.8 Commence weekly progress reports.

DELIVERABLES

- Final work plan
- Spreadsheets of project deliverables and monitoring procedures
- Data request list
- First weekly progress report

TASK GOALS

- Develop initial profile descriptions of Ipswich Public Schools.
- Obtain comparison school district information from the Massachusetts Department of Education.
- Work with the IPS Ad Hoc Audit Committee and the Town Project Manager to narrow the number of comparison districts to approximately 12.
- Initiate benchmarking comparisons.

TASK ACTIVITIES

- 2.1 Examine laws and regulations at the federal, state, and local levels that affect the operations of the school district.
- 2.2 Track reporting requirements of the school district mandated by the federal government and other grantors.
- 2.3 Conduct an analysis of school district data.
- 2.4 Select peer communities for use in the benchmarking process throughout study. Per RFP requirements, the peer group list will be comprised of a combination of DESE provided peer communities and local communities that match Ipswich's profile in resident and student population and economic factors, including income and housing values. Existing student enrollment and staffing levels (central office and school administrative, teaching within each subject area, nursing & custodial) will be considered.
- 2.5 Prepare profiles of IPS and schools, to include:
 - student profiles;
 - faculty/staff profiles;



- financial profiles;
- transportation profiles;
- facilities profiles; and
- initial comparison against peer school systems.

DELIVERABLES

- Initial profiles of Ipswich Public Schools
- List and initial comparisons of peer communities

PHASE II DIAGNOSTIC REVIEW

Task 3.0: Conduct Diagnostic Review of Operations

TASK GOALS

- Diagnose current operations in Ipswich Public Schools.
- Identify areas for potential improvements in efficiency or effectiveness.
- Allow external stakeholders to express their perceptions on the operations of the school district.
- Create a link on the Town and/or school district's web site for this review, if desired by the Committee.

TASK ACTIVITIES

- 3.1 Plan diagnostic visit to Ipswich Public Schools. Interview Committee members, Town leaders, IPS senior administrators and other selected employees. **Note:** Evergreen will provide advance notice of at least 48 hours for any visit to the schools or school offices; Evergreen generally provides a minimum of one to two week's notice per internal protocol.
- 3.2 Conduct focus groups with principals and teachers.
- Discuss who should be interviewed with the Town Project Manager and Committee.
 - Prepare and schedule interviews. Ensure that interviews address study objectives.
 - Conduct interviews.
- 3.3 Conduct interviews with IPS Leaders, Committee Members, and School Committee members.



-
-
- Obtain information on the major strengths and weaknesses of the school district as determined by each interviewee.
 - Obtain information on efficiency and effectiveness as well as management and operational improvements.
 - Summarize interviews.

3.4 Conduct on-site focus groups with external stakeholders (e.g., business and community leaders and associations) to identify efficiency and effectiveness issues in the school district.

- Identify business and community leaders for focus groups.
- Identify parent leaders.
- Prepare guidelines for conducting focus groups.
- Conduct several focus group sessions.
- Analyze results of the focus groups of external stakeholders.

3.5 Conduct public meeting(s), if desired.

3.6 Create a link to online feedback form on the Town and IPS web site for the Operational Review. This online feedback form would allow members of the public to provide opinions on school district operations in the areas being reviewed.

3.7 Prepare summary of diagnostic findings by each of the operational areas, and share with the Evergreen Team.

DELIVERABLES

- Summary of interviews and focus groups with internal stakeholders
- Summary of interviews and focus groups with external stakeholders
- List of possible areas of strength and areas needing improvement
- Active online feedback form to allow public input
- Summary for the Evergreen Team for the In-depth Operational Review



**Task 4.0:
Conduct Surveys of
Central Office
Administrators,
Principals, and
Teachers**

TASK GOALS

- Survey IPS administrators and teachers on their opinions about district operations.
- Obtain valid data on the perceptions of administrators and teachers about the school district.
- Compare survey data in IPS among central office administrators, school administrators, and teachers.
- Compare survey data to Evergreen's national survey benchmark database.

TASK ACTIVITIES

- 4.1 Develop surveys tailored to Ipswich Public Schools.
- 4.2 Have the Town Project Manager or designee review the draft survey.
- 4.3 Conduct administrator, principal, and teacher surveys electronically or in written format.
- 4.4 Analyze the school district's survey data.
- 4.5 Prepare summary of survey results.
- 4.6 Analyze and compare the survey data from central office administrators, principals, and teachers, and share with the Town Project Manager and Committee.
- 4.7 Compare the perceptions of school district employees to benchmark data obtained in previous studies in other school districts.
- 4.8 Create a survey template that IPS can use in the future to assess improvements in attitudes regarding district operations.

DELIVERABLES

- Initial draft surveys
- Final surveys
- Survey analyses within the school district
- Survey analysis with other school districts
- Future survey template

Exhibit 2-3 contains a sample of survey questions from Evergreen Solutions' survey item bank.



Exhibit 2-3
Examples of
Items in
Evergreen's
Survey
Database

H. PURCHASING AND WAREHOUSING

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
3. The Purchasing Office gets me what I need when I need it.					
4. The school district purchases the highest quality materials and equipment at the lowest possible cost.					
5. The purchase order process is efficient and effective.					
6. The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.					

I. TRANSPORTATION

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
7. Students are often late arriving to and/or departing from school because the buses do not arrive to school on time.					
8. There are sufficient buses and drivers to meet extracurricular needs of students.					
9. Buses are often broken down, disrupting services.					
10. The process for requesting a field trip is efficient and effective.					
11. Bus drivers effectively handle discipline issues on the buses.					
12. Students do not feel safe riding school district buses.					
13. Bus ride times are too long.					

J. FACILITIES USE AND MANAGEMENT

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
14. Parents, citizens, students, faculty, staff and the board provide input into facility planning.					
15. Schools are clean.					
16. Our schools have sufficient space and facilities to support the instructional programs.					
17. Schools are well-maintained.					
18. Repairs are made in a timely manner.					
19. District facilities are open for community use.					
20. Emergency maintenance is handled promptly.					
21. The district has an effective energy management program.					



**Task 5.0:
Conduct
Benchmarking and
Best Practices
Review**

TASK GOALS

- Compare programs and operations in other school districts to programs and operations in Ipswich Public Schools [(Note: This analysis provides a more generic comparison using readily available data than comparative analyses conducted during the in-depth review (Phase III)].
- Consult databases on standards and best practices standards, including Evergreen Solutions' best practices database, the Council of Great City Schools key performance indicators and benchmark data, as well as other data sources.
- Analyze program staffing models with those in other school districts.
- Determine potential improvements in the efficiency and effectiveness of programs and operations in Ipswich Public Schools.

TASK ACTIVITIES

- 5.1 Using the peer communities identified in **Task 2.4**, contact the respective peer school districts.
- 5.2 Conduct comparison of IPS statistics to those of selected comparison school districts.
 - obtain already available national comparison data for the selected school districts;
 - correspond with selected school districts to solicit support for more in-depth data gathering activities;
 - obtain commitment and support of comparison school districts for participation in this review;
 - develop comparative analyses; and
 - review comparisons with the Town Project Manager and conduct additional analyses, as appropriate.
- 5.3 Work with comparison school districts to obtain reports and information on selected benchmarks.
- 5.4 Prepare a written summary of findings as it relates to each benchmark in Ipswich Public Schools with each applicable benchmark in comparison school districts.
- 5.5 Compare to best practices in Evergreen's Best Practices Database, national key performance indicators, and other industry-recognized best practices resources.



5.6 Develop preliminary findings for potential areas of improvement in Ipswich Public Schools.

DELIVERABLES

- Results of benchmarking in selected school districts
- Best practice comparisons
- Areas for potential improvement in IPS operations

**PHASE III
COMPREHENSIVE OPERATIONAL REVIEW**

**Task 6.0
Review Salaries and
Staffing**

TASK GOALS

- Conduct a comprehensive preliminary evaluation of IPS existing compensation plan.
- Conduct the external labor market salary and staffing survey.
- Determine reasonableness of IPS salaries and staffing as compared to peer communities including.
- Provide a summary of the survey results to the Town Project Manager for review.

TASK ACTIVITIES

- 6.1 Conduct a thorough review of all materials to date, including employee database, compensation review, and meetings with the Town Project Manager and the Committee.
- 6.2 Determine the strengths and weaknesses of the current pay plan(s) and staffing levels.
- 6.3 Complete an assessment of current conditions that details the pros and cons of the current system as well as highlights areas for potential improvement.
- 6.4 Finalize list of benchmark positions for the external labor market assessment, including but not limited to teachers; clerical staff; teacher assistants; athletic coaching and administrators; and the Superintendent.



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- 6.5 Prepare a customized external labor market salary survey for the Town Project Manager and Committee's approval. Discuss questions and categories for the market salary and staffing survey.
 - 6.6 Contact the peer communities (**Task 2.4**) for electronic completion of the survey. Provide paper copies by fax, if requested.
 - 6.7 Conduct necessary follow-up through e-mails, faxes, and phone calls.
 - 6.8 Collect and enter survey results into Evergreen's electronic data analysis tools.
 - 6.9 Validate all data submitted.
 - 6.10 Develop summary report of external labor market assessment results.
 - 6.11 Submit summary report of external labor market assessment results to the Town Project Manager.

DELIVERABLES

- Review existing compensation plan(s) and staffing levels
- Assessment of current conditions
- Final List of benchmarks
- Market survey instrument
- Summary report of external labor market assessment results, including staffing and compensation

**Task 7.0
Review Curriculum
Management**

TASK GOALS

- Determine the cost and effectiveness of existing curriculum management practices.
- Benchmark IPS curriculum management practices against curriculum management practices in peer communities.
- Assess adequacy of instruction facilities, tools and training.
- Analyze adequacy of class offerings as compared to peer communities, including model comparisons [(e.g. curriculum coordinator vs curriculum teams (Ipswich model))].



-
- Assess textbook replacement cycle and cost.
 - Review methods for curriculum development at each grade level, including the cost and effectiveness of student class scheduling systems and time allotted to core subject areas.
 - Assess the reasonableness of athletic and fine arts offerings as compared to peer communities.

TASK ACTIVITIES

- 7.1 Schedule on-site review and set up interviews with appropriate curriculum and instruction delivery staff.
- 7.2 Assess the Organization and Management of Instruction, including:
- span of control and staffing;
 - delegation of authority and levels of autonomy;
 - facilities utilized;
 - support for classroom teachers; and
 - efforts to meet the needs of school staff.
- 7.3 Examine Curriculum and Instruction, including:
- service delivery costs, including textbook replacement and costs;
 - teacher and non-teacher staffing ratios;
 - properly certified teachers for all courses and grade levels;
 - curriculum alignment with state standards;
 - curriculum alignment with scope and sequence of courses;
 - class offerings and scheduling;
 - curriculum development and modification process;
 - training in curriculum and instruction; and
 - availability and use of curriculum guides.
- 7.4 Assess Student Performance, including:
- dropout rates;
 - graduation rates;
 - effectiveness of school improvement plans;
 - advanced placement exams;
 - dual enrollment courses;
 - support for remediation; and
 - comparison of student performance trends with peer school districts and clusters.



-
- 7.5 Review Special Programs, including:
- the organizational structure of each program;
 - support of classroom teachers;
 - compliance with laws and regulations;
 - program successes and failures; and
 - program goals and objectives.
- 7.6 Review Student Services, including:
- use of a student services plan;
 - assessment of student needs;
 - communication of services;
 - linkage with curriculum and instruction;
 - evaluation of student services.
- 7.7 Examine Instructional Technology, including:
- collaboration between instructional technology and administrative technology staff;
 - effectiveness of the technology plan;
 - use of the Internet;
 - appropriateness of hardware and software for instructional technology;
 - process for selection of software;
 - policies and procedures for handling controversial materials;
 - use of distance learning; and
 - use of technology within instructional programs.
- 7.8 Determine specific quantitative or qualitative performance measures and/or metrics to be used in benchmarking IPS curriculum management practices against those in peer communities. Examples may include:
- description of textbook replacement policy; and/or
 - ratio of instructional staff to students.
- 7.9 Contact peer communities (**Task 2.4**) to obtain relevant benchmarking data. All contact with peers will be coordinated among Evergreen team members to eliminate redundancy in requests and maximize response rate.

DELIVERABLES

- Findings on Curriculum Management, including:
 - instructional organization and management
 - curriculum and instruction
 - student performance



**Task 8.0:
Review Information
Technology**

- special programs
- student services
- program evaluation
- instructional technology

- Summary report of peer benchmarking results

TASK GOALS

- Assess Information Technology staffing levels.
- Evaluate policies and procedures, with consideration for current state standards such as refresh rates to properly maintain or timely replace equipment.
- Assess opportunities for collaboration with the Town of Ipswich or Town of Ipswich Utility IT departments.

TASK ACTIVITIES

- 8.1 Schedule the on-site visit for the technology review. Arrange interviews with IPS technology staff, as well as Town of Ipswich or Town of Ipswich Utility IT departments IT staff.
- 8.2 Review Information Technology Organization and Management, including:
- organization of instructional and administrative technology in the same or separate units;
 - staffing levels in comparison to industry best practice and/or peer communities (**Task 2.4**) with input from **Task 6.0**;
 - reporting relationships;
 - level of authority for technology staff in decision making;
 - turnover rate for technology staff; and
 - customer service orientation of technology staff.
- 8.3 Assess Technology Planning and Budgeting, including:
- use of a technology committee;
 - existence, use, and currency of the technology plan;
 - alignment of technology plan with e-rate requirements;
 - annual and multi-year spending plans for technology;
 - solicitation of grant funding; and
 - disaster recover planning.



-
- 8.4 Review Technology Policies and Procedures, including:
- acceptance use policy;
 - restriction policy for access to files;
 - monitoring and reporting on performance indicators;
 - technology support performance standards;
 - acquisition standards for hardware and software;
 - internal operating procedures; and
 - virus protection procedures.
- 8.5 Review Inventory and Control, including:
- comparison of computer inventory to benchmark standards;
 - age of computers;
 - type of configurations;
 - adequacy of bandwidths;
 - hardware inventory controls;
 - capital assets disposal;
 - value of technology assets;
 - tagging of technology equipment; and
 - licensing of software.
- 8.6 Review System Infrastructure and Integration, including:
- automation of campus-level administrative tasks such as attendance;
 - evidence of redundant data entry;
 - connectivity of Internet; and
 - communications between IT staff and schools.
- 8.7 Review Technology Support, including:
- customer service orientation of technology support staff;
 - effectiveness of information technology operations;
 - use of technology staff at schools; and
 - existence of centralized support structure where Help Desk calls are channeled.
- 8.8 Determine with input from the Town Project Manager and IT leaders areas of interest for collaboration with the Town of Ipswich or Town of Ipswich Utility IT departments.
- 8.9 Conduct meeting(s) with Town of Ipswich or Town of Ipswich Utility IT departments to 1.) understand IT operations in each organization, 2.) identify current collaborative operations, and 3.) determine areas of interest in each organization for collaboration.



**Task 9.0:
Review Purchasing
and Purchased
Services**

8.10 Draft report on opportunities for collaboration with the Town of Ipswich or Town of Ipswich Utility IT departments.

DELIVERABLES

- Findings on Information Technology including:
 - organization and staffing
 - technology planning and budgeting
 - technology policies and procedures
 - inventory control
 - technology acquisition practices
 - system infrastructure and integration
 - technology support
- Summary report on opportunities for collaboration with the Town of Ipswich or Town of Ipswich Utility IT departments

TASK GOALS

- Assess purchasing/procurement function.
- Determine if state purchasing policies are being followed.
- Assess the efficiency of purchasing processes, including if school-based and central office-based purchasing is consolidated within each school, among schools and between schools, and with local municipalities to minimize multiple purchases of the same item and maximize economies of scale.
- Assess the level to which policies and practices are in place to minimize waste and loss.
- Determine whether outside purchased services (such as legal, grounds & buildings maintenance, security & virtual high school) are reasonable and being procured using best practices, policies and procedures.
- Benchmark expenses attributed to outside purchased services against those in peer communities.

TASK ACTIVITIES

- 9.1 Schedule the on-site visit for the purchasing review. Arrange interviews with IPS purchasing/finance staff.
- 9.2 Examine the Purchasing function, including:
- state and local policies for purchasing;
 - purchasing budget;



- specific personnel assigned to purchasing;
- availability of purchasing manuals or handbooks;
- opportunities for shared services;
- automation of the purchasing function;
- use of check and balances in purchasing and payment operations;
- effectiveness of bidding process;
- customer service ratings for purchasing staff;
- monitoring of purchasing operations;
- use of procurement cards; and
- use of purchasing cooperatives.

9.3 Assess the Purchased Services function, including:

- awards to the lowest viable vendor;
- terms and conditions of contracts;
- legal review of contracts;
- mechanism for providing vendors with feedback on performance;
- measurement of performance on contracts and relationship to payments; and
- options for contract renewal.

9.4 Determine specific quantitative or qualitative performance measures and/or metrics to be used in benchmarking IPS outside purchased services against those in peer communities. Examples may include:

- services outsourced; and/or
- ratio of outside legal costs.

9.5 Contact peer communities (**Task 2.4**) to obtain relevant benchmarking data. All contact with peers will be coordinated among Evergreen team members to eliminate redundancy in requests and maximize response rate.

DELIVERABLES

- Findings on Purchasing and Purchased Services
- Summary report of peer benchmarking results

TASK GOALS

- Evaluate the efficiency and effectiveness of the transportation system, including review of regular and special education transportation costs for reasonableness.

Task 10.0:
Review
Transportation



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- Assess bus routing.
 - Examine use of technology in support of the transportation function.
 - Analyze transportation privatization, cooperative agreements, and opportunities for outsourcing versus insourcing.
 - Benchmark IPS transportation costs against those in peer communities.

TASK ACTIVITIES

- 10.1 Schedule on-site visit and interviews with transportation managers and staff.
- 10.2 Assess Transportation Organization and Staffing, including:
 - roles and responsibilities of unit managers;
 - reporting relationships;
 - staffing levels for drivers and mechanics;
 - bus driver turnover;
 - use of substitute drivers; and
 - procedures and staffing for extracurricular activities.
- 10.3 Review Transportation Planning, Policies, and Procedures, including:
 - transportation policies and procedures;
 - use of performance indicators for transportation;
 - evaluation of transportation services;
 - district plan for monitoring transportation costs;
 - budget for transportation;
 - use of shared services;
 - transportation policies for special services (extracurricular, special education, magnet schools, etc.);
 - procedures for handling parent complaints;
 - use and knowledge of emergency procedures;
 - vehicle replacement policy; and
 - spare bus policy.
- 10.4 Examine Routing and Scheduling, including:
 - control and staggering of bell times;
 - use of automation in routing;
 - routing and transportation for special education students;
 - use of special routes;
 - average travel times;



- determination of bus stops; and
- age mix of students on buses;

10.5 Assess Vehicle Maintenance and Fuel Usage, including:

- preventative maintenance program;
- methods to record, monitor, and evaluate transportation maintenance costs;
- procedures for drivers to check vehicles for maintenance needs;
- planned program of equipment and tool replacement;
- use of a vehicle maintenance information system (VMIS);
- tracking and use of fuel; and
- efforts to reduce fuel costs.

10.6 Determine specific quantitative or qualitative performance measures and/or metrics to be used in benchmarking IPS regular and special education transportation costs against those in peer communities. Examples may include:

- cost per mile; and/or
- transportation cost per student.

10.7 Contact peer communities (**Task 2.4**) to obtain relevant benchmarking data. All contact with peers will be coordinated among Evergreen team members to eliminate redundancy in requests and maximize response rate.

DELIVERABLES

- Findings on Transportation, including:
 - organization and staffing
 - transportation planning, policies, and procedures
 - routing and scheduling
 - vehicle maintenance and fuel usage
 - opportunities for outsourcing versus insourcing
- Summary report of peer benchmarking results

**Task 11.0:
Review Elementary
Grade Configurations**

TASK GOALS

- Review the enrollments, grade configurations, staffing, administrative and support staff of Doyon and Winthrop Elementary Schools.
- Determine the potential cost savings and the pros and cons of consolidating Pre- K to grade 2 into one school and grade 3 to 5 into the other.



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- Determine if other grade consolidation configurations would generate program efficiencies and cost savings.
 - Assess the impact of proposed changes on increased transportation costs and the possible loss of Title I funding.

TASK ACTIVITIES

- 11.1 Schedule on-site visit and interviews with school administrators at Doyon and Winthrop Elementary Schools.
- 11.2 Gather and analyze data on enrollment, grade configuration, and instructional, administrative, and support staffing at Doyon and Winthrop Elementary Schools (Data and information from **Task 1.0** will be used where possible). This information will supplement school profiles developed in **Task 2.5**.
- 11.3 Meet with school administrators, the Town Project Manager, and other district leaders to determine preliminary list for considerations to consolidating.
- 11.4 Prepare an analysis of the current financial and operational status of the two elementary schools.
- 11.5 Develop scenarios showing the pros and cons of consolidating Pre- K to grade 2 into one school and grade 3 to 5 into the other, as well as various additional consolidation options based on the financial and operational conditions.
- 11.6 Develop scenarios showing the educational impacts of various consolidation options, including the impact of proposed changes on increased transportation costs and the possible loss of Title I funding.
- 11.7 Estimate cost or cost savings for each scenario.

DELIVERABLES

- Findings on Elementary Grade Configurations, including:
 - cost impact of consolidating;
 - pros and cons of consolidating;
 - additional possible grade consolidation configurations, including financial and operational impacts; and
 - impact of all possible solutions on transportation costs and Title I funding.



**Task 12.0:
Review Outside
Funding and Feoffee
Funding**

TASK GOALS

- Assess and benchmark IPS against peer communities in the following areas: outside funding levels and student user fees— including but not limited to after-school activities, athletics, bussing, parking and lunch fees.
- Assess school facility rental process and uniformity of rental procedures (including fees).
- Conduct a cost/benefit analysis for a part time grant writer.
- Determine if allocation of Feoffee Trust funds adheres to school policy and the court settlement agreement.

TASK ACTIVITIES

- 12.1 Schedule on-site interviews with Finance Office staff.
- 12.2 Review and analyze IPS historical (past three-years) and current budgets to determine outside funding levels.
- 12.3 With input from the Town Project Manager, construct schedule of all student user fees.
- 12.4 Collect and review policies and procedures on school facility rental processes and procedures; determine if individual schools maintain/follow unique policies and procedures on school facility rental process.
- 12.5 Aggregate data on school facility rentals for the last three years.
- 12.6 Report on the extent to which individual schools follow uniform facility rental processes.
- 12.7 Contact peer communities (**Task 2.4**) to collect data on:
- outside funding levels;
 - student user fees;
 - school facility rental fees; and
 - grant revenues.

All contact with peers will be coordinated among Evergreen team members to eliminate redundancy in requests and maximize response rate.

- 12.8 Using data from peer benchmarking, best practices resources, and historical grant funding levels at IPS, determine the cost versus benefit of a part time grant writer; with the goal of determining if a part time grant writer would increase federal, state and/or private grants sufficiently to justify their salary.



**Task 13.0:
Review Professional
Development**

12.9 Collect and analyze data on allocation of Feoffee Trust funds; compare allocation process/levels to related school policy and the court settlement agreement to determine if all requirements have been met.

DELIVERABLES

- Findings on Outside and Feoffee Funding, including:
 - assessment and benchmarking of outside funding levels;
 - assessment and benchmarking of student user fees;
 - school facility rental process and uniformity of rental procedures;
 - cost/benefit analysis for a part time grant writer; and
 - Feoffee Trust fund allocation.

TASK GOALS

- Assess and benchmark against peer communities IPS professional development funding.

TASK ACTIVITIES

13.1 Gather and assess professional development expenditures and current funding levels in the IPS.

13.2 Contact peer communities (**Task 2.4**) to collect data on professional development funding, including but not limited to:

- total professional development expenditures;
- current professional development funding levels;
- breakdown of professional development funding levels by type (e.g. purchase of content, travel expenses, instructor fees, incentive payouts, etc.);
- description of professional development offerings; and
- targeted groups for each type of professional development.

All contact with peers will be coordinated among Evergreen team members to eliminate redundancy in requests and maximize response rate.

13.3 Compare professional development funding levels in peer communities to those in IPS.



**Task 14.0:
Review Collaboration**

DELIVERABLES

- Report on IPS professional development funding levels compared to peer communities

TASK GOALS

- Identify areas where greater collaboration within and between schools or between schools and municipal would yield significant cost savings.

TASK ACTIVITIES

- 14.1 Schedule on-site interviews with Department staff in the areas of IT, payroll, HR, Purchasing, and field maintenance (additional operational areas can be included).
- 14.2 Conduct interviews to determine initial areas of interest for greater collaboration between IPS schools or between schools and municipal.
- 14.3 Based on data, information, and knowledge gathered during subsequent phases of this review, further assess each area of interest determined in **Task 14.2** to determine feasibility of collaboration as well as cost impacts.
- 14.4 Draft report on areas where greater collaboration within and between schools or between schools and municipal would yield significant cost savings.

DELIVERABLES

- Report on areas where greater collaboration within and between schools or between schools and municipal would yield significant cost savings

**PHASE IV
PROJECT REPORTING**

**Task 15.0:
Prepare Draft and
Final Reports**

TASK GOALS

- Hold weekly project updates.
- Recommend strategies for improving efficiency and effectiveness of Ipswich Public Schools.



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- Prepare Draft Report.
 - Prepare Final Report.
 - Make Presentations.

TASK ACTIVITIES

- 15.1 Schedule and conduct weekly conference calls with the Town Project Manager and other officials to resolve issues and to review findings that have occurred to date. Evergreen will provide any questions associated with such meetings to the Committee in advance. **Note:** When onsite, Evergreen will conduct this meeting in-person.
- 15.2 Prepare the overall report from the findings for each operational area.
- 15.3 Develop commendations on exemplary practices.
- 15.4 Develop recommendations on areas needing improvement.
- 15.5 Estimate short and long-term cost or cost savings for each recommendation that impact operational costs, including reasonable, proposed alternatives.
- 15.6 Prepare Draft Report for the Operational Review.
- 15.7 Submit Draft Report.
- 15.8 Meet with the Town Project Manager, as appropriate, to review the Draft Report.
- 15.9 Prepare Final Report.
- 15.10 Submit hard copies and an electronic version of the Final Report.
- 15.11 Present Final Report to IPS School Committee.

DELIVERABLES

- Draft Report
- Final Report
- Final Presentations



2.4 Proposed Project Schedule

This section includes Evergreen's proposed project schedule for the Operational Review of Ipswich Public Schools. As shown in **Exhibit 2-4**, our proposed schedule for the Operational Review, assumes a start date during the second week of November 2014, with submission of findings and recommendations with supporting data by March 4, 2015, and a final report by April 10, 2015.

Over the life of the project, Evergreen will maintain a high level of communication with the Town Project Manager, Committee, and others, as identified, including attendance of review meetings or conference calls as necessary to resolve issues and to provide progress updates and scheduling plans. In addition, Evergreen will attend a face to face public meeting midway through the performance of the contract (proposed during Phase III), to allow for public input. Evergreen will also prepare and present a final written report documenting the findings, recommendations, supporting rationale, and projected costs or cost savings associated with the recommendations; one formal presentation will be made to the Committee on March 25, 2015 of the Findings and Recommendations with Supporting Data. Weekly meetings with the Committee or Town Project Manager will commence during the first week of the project (**Task 1.0**).



Exhibit 2-4 Proposed Project Schedule for the IPS Operational Review

	2014	2015				
	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL
PHASE I - PROJECT INITIATION						
1.0 - Initiate Project						
2.0 - Develop Preliminary Profile of Ipswich Public Schools						
PHASE II - DIAGNOSTIC REVIEW						
3.0 - Conduct Diagnostic Review of Operations		*				
4.0 - Conduct Surveys of Central Office Administrators, Principals, and Teachers						
5.0 - Conduct Benchmarking and Best Practices Review						
PHASE III - COMPREHENSIVE OPERATIONAL REVIEW						
6.0 - Review Salaries and Staffing			*			
7.0 - Review Curriculum Management			*			
8.0 - Review Information Technology			*			
9.0 - Review Purchasing and Purchased Services			*			
10.0 - Review Transportation			*			
11.0 - Review Elementary Grade Configurations			*			
12.0 - Review Outside Funding and Fee/fee Funding			*			
13.0 - Review Professional Development			*			
14.0 - Review Collaboration			*			
PHASE IV - PROJECT REPORTING						
15.0 - Prepare Draft and Final Reports					1	2*
						3*

*Denotes onsite activities

- 1: March 4, 2015 - Submission of Findings and Recommendations with Supporting Data
- 2: March 25, 2015 - Formal Meeting with Committee to Review March 4, 2015 Submission
- 3: April 10, 2015 - Final Report Due



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Chapter 3

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3.0 References

As required in the Request for Proposal, we have provided you with five references that we feel demonstrate the breadth and quality of the work our team has performed as it relates to the services being requested by the Town of Ipswich. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Additional references are available upon request.

**Organizational, Efficiency and Effectiveness Study
Manchester Public Schools, Connecticut**

Contact Information: Ms. Patricia F. Brooks, Assistant to the Superintendent
(860) 647-3445
pbrooks@manchesterct.gov



**School Department Operations and Staffing Study
Needham Public Schools, Massachusetts**

Contact Information: Dr. Daniel E. Gutekanst, Superintendent
(781) 455-0400
Dan_Gutekanst@needham.k12.ma.us



**Operational Audit of the Hamilton-Wenham Regional School District
Town of Hamilton, Massachusetts**

Contact Information: Mr. Michael A. Lombardo, Town Manager
(978) 468-5572
mlombardo@hamiltonma.gov



**Performance Audit of District Operations
Toledo Public Schools, Ohio**

Contact Information: Mr. Matt Cleland, Treasurer
(419) 671-8245,
mcleland@tps.org



**Operational Effectiveness and Efficiency Audit
Richland Two School District, South Carolina**

Contact Information: Dr. Katie Brochu, Former Superintendent
(706) 847-3664
katiebrochu@aol.com



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