

**SCHOOL BOARD
CONTRACT SUMMARY FORM
2021-2022**

Contract Name: District Management Group

Action Sought by School Board: Approval of a Contract Approval of an RFP to Solicit Services

Amount: \$975,000

Source of Funds: ESSER II (Contingent Upon Funding) District-Based School-Based

Length of Contract (list start date and end date): March 1, 2022 to December 31, 2023

PPSD Contact: Christopher Petisce, Zachary Scott

Contract Type: New Renewal Extension Amendment

(If existing contract that was approved by Board of Contract and Supply, provide dates of BOC approval): N/A

Staff Recommendation & Analysis

Provide 1-2 sentences for staff recommendation.

Provide 3-5 bullet points for staff analysis that supports the recommendation.

Staff Recommendation:

It is recommended that the Board approve a contract with District Management Group (“DMGroup”) for a total amount not to exceed \$975,000 for the period March 1, 2022 to December 31, 2023 for support with the implementation of Student-Based Budgeting in the district.

Staff Analysis:

DMGroup will support PPSD in its aims to enhance transparency and predictability in budget allocations to schools by implementing the student-based budgeting model. With increasing pressure to raise student achievement at all levels with uncertain district finances, DMG will assist PPSD in finding ways to enhance equity in the budgeting process. In-time the SBB model will also lead to levels of autonomy for Principals at the School level, to ensure students at those specific buildings have the tools they need to succeed.

About Student-Based Budgeting

“With [student-based budgeting], districts set varying per pupil funding amounts based on the specific costs of providing services to students with identified needs and then allocate the same amount of funding to students with comparable education needs regardless of which school they attend.”

Alternatives

Provide a numbered list for what the alternatives are to this recommendation.

This purchase is being made through State of Rhode Island Master Price Agreement 589 for School Redesign and Strategic Support Services. All six vendors approved on that contract were contacted to submit a proposal for the scope of work. DMG was the sole bidder.

DMGroup has previous experience supporting districts in designing and implementing SBB models, including Boston Public Schools (MA), Minneapolis Public Schools (MN) and Baltimore City Public Schools (MD).

In one numbered list, describe the deliverables of the contract and the projected impact upon or relationship to student achievement.

Provide a numbered list of every deliverable identified in the contract and summarize the contract's overall relationship to student achievement.

Task	Deliverable	Deadline (end of)
Workstream One: Research and project management to ensure successful implementation of student-based budgeting		
1a. Research of best practices and evidence supporting successful SBB implementation in comparable Districts.	<ul style="list-style-type: none"> - Summary of findings and best practices for SBB - Guidance for allocating resources more effectively - Research base of Districts who have successfully implemented 	April 2022
1b. Examine current budget process through stakeholder interviews, focus groups, data and documentation in comparison to the 1a deliverables.	<ul style="list-style-type: none"> - Presentation of pros and cons of SBB implementation as it relates to current PPSD budget process - DMG recommendations for implementation of SBB highlighting portions of PPSD process which may stay & aligning with best practices identified as part of 1a deliverables. 	May 2022
1c. Review PPSD ESSER funding allocation as it relates to projected shifts in allocations over several fiscal years.	<ul style="list-style-type: none"> - Recommendation to PPSD for utilizing ESSER funding to address funding changes for certain schools, specific areas 	June 2022

	of student need and district priorities.	
1d. Determine feasibility and desirability of accelerating funding to schools projected to see an increase in budget via the SBB formula.	<ul style="list-style-type: none"> - Recommend options for how PPSD could proceed with implementation of SBB, including the possibility of an accelerated or more gradual roll out based on methodical review assessing projected changes in funding allocations across schools. - Support PPSD leadership in crafting an action plan for implementation 	June 2022
Workstream Two: Model refinement, testing & fiscal projections		
2a. Refine and finalize SBB model.	<ul style="list-style-type: none"> - Finalize refined SBB model based on updated budget, enrollment and staffing data - Share projected school funding allocations using SBB methodology 	July 2022
2b. Review budget and enrollment data projections for next three years	<ul style="list-style-type: none"> - Evaluation of feasibility and sustainability of SBB based on budget projections for 3 fiscal years 	July 2022
2c. Develop SBB budgeting tools, templates and training materials.	<ul style="list-style-type: none"> - Budgeting tools, templates and training materials to enable successful mock school-based budgeting that are aligned to PPSD systems and structures. - Will include description of how resources are allocated through formula and what other resources schools receive outside of the SBB formula; identification funding sources for resources; built in checks on SBB resources to ensure guardrails or compliance regulations are met; staffing rosters for current year to 	August 2022

	<p>compare next year's staffing plan.</p> <ul style="list-style-type: none"> - Guidance for principals on how resource use and flexibility will change with new system - Will include key milestones for school leaders throughout budget process; clear and transparent summary of the types of allocations schools receive; summary of resources received outside of SBB formula; guidance and recommendations for major resources categories in which principals have some level of resource flexibility. 	
2d. Engage cohort of principals (4-6) in mock budgeting exercise	<ul style="list-style-type: none"> - Identification of cohort; FY23 mock budget materials; facilitation of regular meetings and exercises to simulate budget decisions and highlight differences between historical budgeting process & SBB. 	October 2022
Workstream Three: Ongoing Training and Resources for Principals		
3a. Regular meetings with principals to support understanding of budget allocation process	<ul style="list-style-type: none"> - Host regular meetings in collaboration with PPSD leadership with principals to support understanding of budget allocation process - Support school leaders with understanding core aspects of school district finance and budgeting, including how preliminary funding allocations are calculated based on enrollment and revenue projections and how final school allocations may be adjusted due to changing 	October 2022

	enrollment and revenue scenario	
3b. Support materials for principals engaging with school community on budget decisions.	<ul style="list-style-type: none"> - Support materials will include developing a calendar and plan for engaging school communities that is aligned to the budget calendar - Materials to document stakeholder needs and identify school budget priorities and specific expenditures 	November 2022
3c. Brief analysis of best practices for meaningful stakeholder engagement in budget process.	- Brief analysis of best practices for meaningful stakeholder engagement in a site-based budget process	December 2022
Workstream Four: Implementation Support for Projected Enrollment Shifts & Scenarios		
4a. Detailed plan for revising allocations based on any enrollment shifts and reductions in revenue.	<ul style="list-style-type: none"> - Detailed plan for the district to revise allocations based on any enrollment shifts - Outline of district's current process for shifting resources based on changes in enrollment or need - Identified strengths and opportunities based on the district's current approach to shifting resources - Specific recommendations and plans for how allocations could be adjusted based on shifts in enrollment, need, or revenue, consistent with SBB 	September 2022
4b. Support with district process for enrollment projections and allocations.	<ul style="list-style-type: none"> - Support with district processes to develop projections for enrollment and allocations, focused on alignment and timing of sub-components - Support with incorporating necessary checks into the enrollment and allocation 	November 2022

	processes to ensure appropriateness and accuracy	
4c. Support school leaders with any changes in allocations.	<ul style="list-style-type: none"> - Support district and school leaders to incorporate contingency plans into budgets to reflect possible changes in allocations - Support school leaders to implement adjustments to their budgets so that expenditures are in line with the identified needs of the school community and district strategy 	February 2023
Workstream Five: Communication planning to train and engage stakeholders on SBB implementation		
5a. Prepare materials for regular leadership updates regarding SBB	<ul style="list-style-type: none"> - Powerpoint decks and memos will be provided for the PPSD leadership team to utilize for their ongoing communication with RIDE and the School Board. DMGroup will also join meetings to support in communication when needed and appropriate as mutually agreed 	April 2023
5b. Prepare materials for school-based communication regarding student-based and site-based budgeting.	<ul style="list-style-type: none"> - Communication plan for school-based communication regarding SBB - Communication materials for school-based communication regarding SBB - As needed and appropriate as mutually agreed, provide training for principals and school teams regarding strategic communication and stakeholder engagement. 	December 2023

In no more than three paragraphs, describe the accountability measures that will ensure that the vendor meets all requirements set forth in the contract and that the district is able to maintain a record of the quality of the services. These need to be performance-based in nature.

Every contract should include explicit language requiring vendor accountability, i.e. required program evaluation or the submission of a final report summarizing progress against each itemized deliverable.

The Deputy Superintendent of Operations and Executive Director of Finance will monitor project completion to ensure that contractor is providing deliverables at the agreed upon date detailed above.

In a short numbered list, describe spending breakdown by type of service.

If the contract includes multiple components, detail the total proposed contract amount by type of service, i.e. licensing fees, purchased services, professional development, technical assistance, supplies and materials, etc.

The State of Rhode Island Master Price Agreement 589 through which this solicitation and award is made requires that pricing be secured as a lump sum fixed fee. As such, the resulting contract is for a lump sum fixed fee inclusive of all professional fees as well as any additional expenses associated with the project such as administrative costs, printing and supplies, travel costs (e.g. airfare, hotel and any travel related fees).

Proposed Budget	Dollar Amount
Total Contract Cost for all three work streams outlined above	\$975,000
Total	\$975,000