



January 13, 2022

Kelly Crockett
Lowell Public Schools
155 Merrimack
Lowell, MA 01852

Dear Ms. Crockett,

On behalf of Public Consulting Group LLC (PCG), we are pleased to submit this proposal to the Lowell Public Schools to complete a review of the Student Enrollment Process. We detail our qualifications and proposed work plan in the following pages. PCG is prepared to begin work immediately, with all work completed no later than March 4, 2022.

PCG has a proven track record in supporting education decision makers to develop strategic agendas and achieve desired outcomes. We understand the issues that face educational organizations and work closely with our client partners to use data to improve their programs and outcomes. Since our founding three decades ago, our firm has consistently grown the number of clients we serve and the number of students whose lives we positively effect.

We believe that we offer the best strategy and value to meet the scope of services outlined in this proposal.

If you have any questions or wish to discuss potential next steps, please do not hesitate to contact me at adentremont@pcgus.com or 617-320-6516.

Respectfully,

A handwritten signature in blue ink that reads "Anna d'Entremont".

Anna d'Entremont
Associate Manager
Public Consulting Group LLC

FIRM QUALIFICATIONS



PCG was **founded in 1986, over 30 years ago**, with a corporate mission of “Solutions that Matter.” Today PCG is one of the largest firms in the nation devoted to delivering innovative, cost-effective solutions and training to government agencies. We understand the issues that face educational organizations and work closely with our client partners to strengthen and improve their programs, lessons, and outcomes.

PCG has extensive experience in all 50 states, and over 1,000 open contracts at any given time. As a leading education consulting firm,

PCG brings national expertise and the proven strategies to inform recommendations for organizational efficiency and effectiveness, as outlined in this statement of work. PCG directly serves over 6,200 school districts, 27 State Departments of Education, 24 of the 30 largest urban school districts, and 61,000 schools. Our firm not only provides consulting and technical assistance support in many areas of Education, but also in the areas of Health, Human Services, and Technology. PCG has grown to employ over 3,500 fulltime professionals across 50+ offices worldwide.

We have the financial stability, resource depth, and strategic expertise to ensure the quality and positive impact of PCG’s services. PCG’s services help state agencies and school districts achieve equity for all students, accountability for results, and support continuous improvement. Our work includes a large span of services, including process engineering, organizational effectiveness, program design, change management, and professional learning. But no matter the program area or service, **we rally around the common goals of evolving government and improving outcomes for the people it serves.**

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PCG continuously demonstrated their expertise and professionalism, providing high quality, reliable services and information that resulted in meaningful dialogue leading to positive structural changes in the district. The plan of action was successful because it started with excellent communication that led to engagement with all stakeholders.

JOHN FRAZONI
SUPERINTENDENT, NORTH BERKSHIRE SCHOOL DISTRICT, MA

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Our staff make use of a wide range of tools and approaches, including internally developed models, resources, and software to build systemic capacity through the application of research-based knowledge, sustained professional development, cutting-edge technology, and collaborative partnerships. Furthermore, we follow and use national best practices and standards to effectively guide our clients. PCG is a privately-owned corporation, and the firm’s structure allows us to address the unique needs of each client by assembling project teams that call on varied knowledge and skills across PCG’s areas of expertise.

PCG understands education reform must reflect the local context and political realities. PCG supports change management through the careful analysis of functions and outcomes. That is, we act as an outside agent who has an

objective perspective and works together with educational entities to identify challenges and provide recommendations for improvement. We value strong client relations and believe that a significant component of the work is ongoing and meaningful communication. PCG believes this project, and the results that will follow, offers the Lowell Public Schools a tremendous opportunity to support positive, equitable outcomes for every student.

Relevant Project Experience

PCG has significant experience redesigning organizations and long-term planning for government agencies both inside and outside of the education sector. Our public sector clients include state and local government agencies, hospitals, foundations, universities, and non-profits.

Listed below are recent education clients that partnered with PCG for similar work.

- **Alabama State Department of Education Organizational Study and Strategy to Action Plan Creation, Department of Examiners of Public Accounts, AL.** PCG conducted an organizational and staffing analysis of Alabama's state education agency at request of the state legislature. PCG made recommendations for improvements to policies, programs, funding, and organizational structure across all agency functions in this high-profile and complex project. The State of Alabama has since reengaged with PCG to lead the creation of a *Strategy to Action Plan* to drive short and longer-term reform efforts. This document and accompanying tools serve as the guide and the plan forward for the next two years, with the end goal of improved student outcomes. This phase of the work includes providing regular strategic advising, coaching and technical assistance to the State Superintendent and his senior leadership team.
- **Project Management Consultant for the New Worlds Reading Initiative, Lastinger Center for Learning at the University of Florida, FL.** The Lastinger Center for Learning at the University of Florida hired PCG to provide strategic consulting, project management, and technical assistance support as the Lastinger Center implements the New Worlds Reading Initiative to engage families across the state in literacy efforts. NWRI is a statute-born monthly at-home free book delivery program targeted at Florida K-5th graders who are reading substantially below grade level. At scale the program will serve 500,000 students each month. PCG has developed recommendations reports, implementation plans, staffing plans, project management workflows and a comprehensive best practices report informed by interviews with other book distribution organizations. The Lastinger Center has recently engaged with PCG to develop the Center's five-year **Strategic Plan**.
- **Public School Monitoring Strategic Plan, Massachusetts Department of Elementary and Secondary Education, MA.** PCG provided technical assistance to determine how federal and state public school compliance monitoring could be reimagined to better support improved student outcomes and align to the Commonwealth's larger reform priorities. The final recommendations report included multi-year implementation plan. The Department re-engaged PCG to develop all documentation and materials for statewide dissemination.
- **Statewide Review of Educational Opportunities, Delaware Department of Education, DE.** PCG produced a comprehensive report to support informed decision making of Delaware's future school capacity needs, considering the specific needs of diverse and at-risk learners. PCG determined projected gaps and future needs in schooling options for all of Delaware's students. The project was a follow up to initial work completed for the state. Phase 1 included creating an inventory and public-facing interactive map of all schooling options available to students across the state of Delaware. This work supported the development of the State Strategic Plan.
- **Organizational Review, Los Angeles Unified School District, CA.** PCG conducted a study of Los Angeles Unified School District's fiscal efficacy and organizational structures to support outcomes for students with disabilities. This was a comprehensive review of the district's special education program to identify efficiencies in service delivery and decrease costs. The report addressed the impact of budget cuts, recommended programmatic and operational efficiencies, and identified existing best practices. The report included a prioritization roadmap with cost implications for short and long-term implementation strategy.
- **Interstate Merger Feasibility Study and Implementation Strategy, MA-VT.** PCG conducted a feasibility study for an interstate merger between two rural school districts in Vermont and

Massachusetts, a first between these two states. PCG was charged with presenting multiple options for district consolidation and reorganization across state lines. The study reviewed the impact on all key functions: governance, staffing, transportation, food services, utilities, technologies, current course offerings, teacher retirement, school choice policies, fees and participation rates, long term facilities plans and immediate facility needs, services to special populations, and enrollment projections. In July 2019, both communities overwhelmingly voted to move forward with the merger based on PCG's recommendations. The two communities reengaged with PCG in fall of 2019 to offer project management and implementation support.

- ***Elementary School Sustainability Strategic Plan and Roadmap, Roman Catholic Archdiocese of Boston, MA.*** PCG collaborated over multiple years with the Roman Catholic Archdiocese of Boston to define their strategic priorities and create a sustainable, long-term operating model for the 83 Archdiocesan elementary schools. The project included reorganization of central office and service delivery approach to schools. The strategic planning process included development of sustainability metrics, analysis of enrollment strategies, and a proposed long-term growth strategy.
- ***Operational Review, Newark Public Schools, NJ.*** PCG conducted an operational review with focus on finance, technology, and data. Investigated staff structures and documented redundancies. Provided recommendations for streamlining operational procedures.
- ***Operational Study and Analysis, Alabama Department of Early Childhood Education, AL.*** In 2021, PCG was contracted to conduct an organizational and staffing analysis of the Agency. PCG is in the process of reviewing policies, programs, funding, and organizational structure across all agency functions. Additionally, PCG conducted focus groups and interviews with Department staff. PCG provided recommendations to improve operational effectiveness and efficiency based on the findings from the comprehensive organizational review. The Secretary requested that equity be a primary report component.
- ***District Organizational Equity Review, Reynolds School District, OR.*** PCG examined how the central office is organized and determine the resources and support required to enable the district to significantly improve outcomes for every student. The district reengaged with PCG to conduct an ELL audit, a Human Resources audit, and facilitate district-wide strategic planning with an equity focus.
- ***Work-based Learning Strategy, San Diego Workforce Partnership, CA.*** PCG was hired by the SDWP to conduct a review of the high school internship program for one of the County's largest school districts. A key component of the district's college and career readiness initiative, PCG analyzed the current work-based learning offerings and developed recommendations that would allow the program to scale and be more accessible to students and business partners in the community.
- ***Public School Approval Technical Support and Assistance, New Hampshire Department of Education NH.*** PCG provides strategic consulting, project management, and technical assistance support for the Department as it seeks to implement changes to improve the effectiveness of the New Hampshire Public School Approval Process. PCG conducted an evaluation of the current administrative rules, procedures, and state laws governing the state's public school approval process. Upon completion of the analysis, PCG facilitated discussions with the Department and identified stakeholders to design a high-quality implementation plan that ensures all New Hampshire public schools receive a rigorous assessment of compliance and ability to provide an adequate and equitable education.
- ***Family and Community Engagement Diversity Plan, Greenwich Public Schools, CT.*** PCG supported the creation of a Family and Community Engagement Diversity Plan to address achievement gaps by ensuring the district is appropriately engaging all Greenwich families and community members. PCG is now conducting a Special Education Review for the district.

- **Strategic Communications Plan, Holyoke Public Schools, MA.** PCG developed and implemented a strategic communications plan for a district under state receivership designed to communicate turnaround strategies with stakeholders including families, community members, students, staff, and prospective teachers.
- **Inclusive Practices Communications Campaign, Denver Public Schools, CO.** PCG partnered with Denver Public Schools in Colorado to develop communications materials to promote the District's Inclusive Practices Campaign. PCG conducted interviews and focus groups to collect information about key themes and best practices around inclusion happening across the district, and delivered a series of templates, posters, and infographics to effectively convey these messages.

Proposed Project Team

All project team members are based in Boston.

Anna d'Entremont is an Associate Manager at PCG and will serve as **Project Director**. She brings over two decades of education and management experience to this project, and nearly 14 year providing consulting services to MA school districts. She has a strong background in understanding the organizational policies and practices essential to support program and process improvement. She partners with senior education leaders across the country to provide strategic consulting services on high profile engagements that promote student success and improve equitable practices. She has worked with numerous schools, districts, and state education agencies across the country delivering consulting services, including governance structures, strategic planning, and guiding educational leaders through change management. State-level clients include the Delaware Department of Education, Minnesota Office of Higher Education, Rhode Island Department of Education, Alabama State Department of Education, and the Massachusetts Department of Education, among others. Prior to joining PCG in 2008, Anna was the Director of Operations of the Edward W. Brooke Charter School in Boston, MA. In this role, she served as co-director and the operational leader of a high-performing K-8 urban charter school. Anna also worked as a Program Officer at New Visions for Public Schools, where she managed a diverse portfolio of initiatives designed to support and develop innovation in 85 new small high schools across New York City. Anna began her career as a bilingual kindergarten teacher for the Houston Independent School District and as an elementary ESL teacher in DC Public Schools. She is also a Teach for America alumna and received her Ed.M in Education Policy from Teachers College, Columbia University.

Meredith Crouse is a Senior Consultant with PCG and will serve as the **Business Process Review Lead** for this engagement. Meredith has worked with public sector clients nationwide on engagements related to policy, strategic planning, monitoring, business processes, and program design and implementation. As Employer Engagement Manager for Boston's Workforce Development Board, Meredith managed work-based learning programs with Boston Public Schools and employers. She also led the Boston Healthcare Careers Consortium, a sector convening of business, education, and the workforce system that has been recognized by the U.S. Department of Labor as a national model for leadership in industry collaboration. Meredith has direct-service experience providing job-readiness support to youth and adults through one-on-one coaching and group workshop facilitation. She has worked with community college training programs to support curriculum alignment with industry needs and help graduates connect to employment. Meredith has coordinated business services activity and assisted with career center operator chartering for American Job Centers. She also has experience analyzing and reporting institutional higher education data to internal audiences for the purposes of strategic planning, and to the U.S. Department of Education for federal reporting compliance. Meredith holds a Bachelor of Science degree from Virginia Tech and a Master of Public Administration from Cal Poly Pomona.

Jacqui Stokes is a Senior Consultant with PCG and will serve as the **Family Engagement Lead**. Jacqui has a decade of experience working in Prek-12 education including teaching, school and district leadership, and non-profit management. She has specialized content knowledge in language acquisition, linguistics, emergent literacy, and special education. She obtained her master's degree in Curriculum and Instruction

in English as a Second Language from Boston University and holds a PreK-6 teaching license in English as a Second Language. She taught literacy and ESL to multilingual learners in Boston, Lawrence, and New York City.

Kate Christie is a Business Analyst at PCG, supporting project management, data analysis and visualization, and policy research. Her recent projects include a State Department of Education Operational Study, Statewide Literacy Initiative Strategic Planning and District Equity Audit. Kate is passionate about using data to inform conversations around equity and make data-driven decisions and recommendations. Prior to joining PCG, Kate completed her bachelor’s degree at Dartmouth College in Quantitative Social Sciences and Education. During this time, she worked as a Research Assistant in the Department of Quantitative Social Sciences on several data science and public policy research projects. These included studying the efficacy of a randomized controlled trial of a summer bridge program for first generation and low-income students, the impact of Covid-19 relief funding on small business vitality, a report for the Department of Housing and Urban Development on the impact of placing college navigators in public housing, and more recently a continuing project on parent beliefs around how to optimize school resources for students in Covid-19. As a research assistant, Kate supported various aspects of the research process including preparing IRB submissions, pre-analysis plans, presentations, and final papers. Kate also worked as an Education Technology Intern for DreamWakers where she connected career professionals from diverse backgrounds to under-resourced classrooms to increase students’ exposure to new career paths and connect them with mentors who have shared identities and experiences.

WORK PLAN

PCG understands LPS seeks the services of an external consultant to conduct a comprehensive review of the school district’s student enrollment process. LPS offers a school choice system that is centrally managed by the Family Resource Center. PCG’s review will provide the district with both an analysis of current processes and recommendations for future improvements. PCG understands that LPS seeks to increase process efficiency, along with ensuring a family-centered placement process.

PCG’s review will assess the following functions:

- Effectiveness of current phone and email communication systems
- Effectiveness of the online registration platform
- Efficiency of the cross-departmental workflow process, including the following: language testing, immunization review, Special Education review, transportation, McKinney-Vento homeless status review, etc.
- Review of customer service, including translation and interpretation supports
- Review of overall project management of the school assignment process

PCG has assumed a six-week project schedule to ensure that all work is completed prior to March 4, 2022

Project Phases Overview

Weeks 1-2: Project Launch and Planning	
Description	Project organization and management
Deliverables	<ul style="list-style-type: none"> • Project plan and timeline
Week 3-4: Data Collection	
Description	Compiling qualitative and quantitative data to understand the drivers behind the gaps in equitable practices and policies in APS.
Timeframe	
Deliverables	<ul style="list-style-type: none"> • Data and document request, including technology access • Interviews with key district leadership and staff

	<ul style="list-style-type: none"> • 1-2 focus groups with families who have recently participated in the process
Week 5: Initial Findings Report	
Description	Presenting initial data analysis and findings to the LPS leadership team for discussion and feedback.
Deliverables	<ul style="list-style-type: none"> • Data review and analysis • Preliminary findings report, with process workflow changes
Week 6: Final Report	
Description	Finalizing the report, with a proposed timeline for recommendations
Deliverables	<ul style="list-style-type: none"> • Final Report • Recommendations Prioritization (Immediate, Near and Long-term)

Weeks 1-2: Project Launch and Planning

Establishing a strong foundation is essential for any successful engagement. The first phase of work includes articulating project goals, timelines, and the vision of the work. These meetings provide the opportunity to understand project expectations and to establish a collaborative working relationship with the client project team.

- **Project Kickoff Meeting (1 hour)**
 - Introduce project team
 - Confirm project goals and objectives
 - Review project plan (charter, schedule, communication plan, etc.)
 - Identify necessary participants for data collection
 - Determine format of final deliverables
- **Work Session – Analysis of Current State (2 hours)**
 - Confirm Student Enrollment Process desired outcomes
 - Identify current strengths and known gaps
 - Identify future opportunities and potential risks

PCG will build in several project controls to ensure timely project communications and decision-making. Following the initial kickoff meeting, PCG will finalize an iterative Project Plan. The project work plan document will encompass key deliverables, high-level actions, and project timeline. PCG will hold regular project management calls with the identified client Project Manager. These project management calls not only serve to keep us on track, but also help to support knowledge transfer. Following each call, PCG will send out a status email with identified action items.

Weeks 3-4: Data Collection

PCG will work to understand the current state of the student enrollment processes, practices, and systems in place in LPS in order to make recommendations for future improvement.

Interviews: PCG will conduct 1:1 or small group interviews with key district leaders and staff to understand current practices and opportunities for improvement. Interviewees may include: the Coordinator of the Family Resource Center, Enrollment Clerks (3), Special Education, Transportation, Finance & Operations, Technology and the Superintendent. PCG will ideally spend 2 days onsite to conduct these interviews. PCG will also use this onsite time to observe Family Resource Center activities.

Focus Groups: PCG will conduct 1-2 focus groups with families who have recently engaged in the student enrollment process to understand their experiences and where they see potential opportunities for improvement. PCG will need the help of LPS to help recruit participants given the fast timeline of this

engagement. These focus groups will last 60 minutes each. If desired, PCG can conduct one of these focus groups in Spanish. PCG will conduct these interviews via video conference to all for greater family access to participate.

Data and Documents: PCG will submit a data and document request to LPS. PCG may request data such as numbers served by mode, average response time, website hits, etc. PCG will also request relevant family satisfaction annual survey data. Requested documents may include policies, manuals, handbooks, communications, and other promotional and programmatic materials. PCG will also request access to the online student registration platform.

Week 5: Initial Findings Report

PCG will analyze and synthesize data as it is collected. PCG will prepare an Initial Findings report that addresses the identified study questions, including proposed workflow changes. Once completed, PCG will facilitate a work session with the LPS to determine recommendations acceptance, and where revisions are needed.

Week 6: Final Report

PCG will submit a final written audit report. The report will include commendations and recommendations for process improvements. Recommendations will be prioritized by immediate action required, near-term and long-term.

COST ESTIMATE

Public Consulting Group LLC (PCG) is pleased to present the following pricing for the completion of a Student Enrollment Process Review for the Lowell Public Schools. We are confident that we provide the best value for an exceptional level of service.

PCG is fully open to further conversation to refine the project scope to best meet your needs, timeline, and budget.

Pricing	
Total Pricing	\$30,000

In preparing the approach, timelines, and pricing that is detailed within this proposal, we assume the following:

- Costs are fully inclusive of all incidentals and non-salary expenses, including any travel costs that may be incurred. Overhead costs are included within PCG’s standard rates.
- PCG will hold proposed prices one hundred twenty (120) calendar days after the opening of the final price proposals, or through the contract award date, whichever is earlier.
- All proposed members of the project team will be active and engaged members of the team.
- Upon project start-up, PCG and the client project team leaders will meet to conduct a detailed work plan review to fully define the project scope. This meeting should occur directly after contract signature and will be used to map out key dates, establish team responsibilities, and confirm project expectations. This exercise will ensure all project participants are entering into the engagement with similar expectations.

- The client will appoint a project manager to this engagement. The project manager will be in frequent communication with PCG and support logistics.
- A weekly conference call will be held between PCG and the identified project manager to review the project work plan and provide project guidance.
- Work will be performed on a fixed price basis to ensure cost controls.