

ORIGINAL

April 1, 2020

RFP



SUBMITTED BY:

MELANIE HICKS, PH.D.

VICE PRESIDENT
EDUCATION SOLUTIONS GROUP

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MGT OF AMERICA CONSULTING, LLC

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TAMPA, FL 33609

DEMOGRAPHIC AND ENROLLMENT STUDY

RAYTOWN C2 SCHOOL DISTRICT

SUBMITTED TO:

DR. STEVE SHELTON
ASSOCIATE SUPERINTENDENT OF OPERATIONS



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SUBMITTAL LETTER

March 30, 2020

Dr. Steve Shelton
Associate Superintendent of Operations
Raytown C2 School District
6608 Raytown Road
Raytown, MO 64133



Dear Dr. Shelton,

MGT Consulting Group is pleased to submit our proposal in response to Raytown C2 School District RFP for a **Demographic and Enrollment Study**. MGT has reviewed the RFP and has provided email correspondence that confirms change of the submission method from hardcopy to electronic, as relief due to COVID 19 closures and adjustments across the U.S.

It is our understanding that Raytown C2 School District (“District”) is requesting a demographic and enrollment projections study, specifically for enrollment analysis and student projections and capacity and utilization analysis. Raytown C2 School District is undertaking a significant effort to develop projections and capacity/utilization analysis that aligns to the long-term vision to guide future facility use decisions. We share the mission that data-driven projections and facts should guide facility decision making and be a roadmap for future investment in District facilities based on existing and projected needs. This demographics and projections study will both pinpoint current status of enrollment, examine trends and patterns, and create projections for future strategic planning and recommendation on educational programming best suited for the students. It will drive and support the focus on educational needs for students. We believe you will see from this proposal that we have put together the project team and strategies that can best meet these objectives.

Our team’s approach to planning and analysis is based on our methodologies, models, and tools that we have developed specifically for educational planning coupled with over 30 years of service to the public education community across the country and internationally. We are a national educational consulting firm that has worked with large and small, rural and urban, growing and declining school districts. We have excellent experience assisting school districts with similar project objectives.

We fully recognize the opportunities and the challenges associated with a project of this nature and the importance of conducting the project *in collaboration* with Raytown C2 School District. It is our hope to support the vision of the District to support total operational efficiency. We look forward to working with the District on this exciting project and would welcome the opportunity to meet with you in person to learn more about your vision for the project and our ability to help you realize that vision. Our proposal terms are valid for 90 days.

FIRM INFORMATION

MGT of America Consulting, LLC
4320 W. Kennedy Blvd. | Tampa, Florida 33609
P 888.302.0899 | F 850.385.4501
FEIN – 81-0890071 | www.mgtconsulting.com

SUBMITTAL LETTER



INDIVIDUAL AUTHORIZED TO COMMIT FIRM	J. Brad Burgess, Executive Vice President, and General Manager 2251 Harvard Street, Ste 134 & 102 Sacramento, CA 95815 P 916.443.3411 bburgess@mgtconsulting.com
OFFICIAL CONTACT PERSON	Melanie Hicks, Ph.D., Vice President, Education Solutions Group 8200 S. Quebec Street, Suite A3#184 Centennial, CO 80112 P 813.344.7203 mhicks@mgtconsulting.com

If you have questions on any part of this proposal, please contact **Dr. Melanie Hicks**, MGT's Executive-in-Charge for this engagement at **813-344-7203** or **mhicks@mgtconsulting.com**. As the Executive Vice President of MGT of America Consulting, LLC, I am authorized to bind the company contractually. Thank you very much for this opportunity.

Sincerely,



J. Bradley Burgess
Executive Vice President and General Manager
Authorized Signer



REQUIRED FORMS

EVERIFY

(Must be included in sealed envelope)

EXHIBIT A: FEDERAL WORK AUTHORIZATION PROGRAM AFFIDAVIT

I, J. Bradley Burgess, being of legal age and having been duly sworn upon my oath, state the following facts are true:

1. I am more than twenty-one years of age; and have first-hand knowledge of the matters set forth herein.
2. I am employed by MGT of America Consulting, LLC (hereinafter "Company") and have authority to issue this affidavit on its behalf.
3. Company is enrolled in and participating in the United States E-Verify (formerly known as "Basic Pilot") federal work authorization program with respect to Company's employees working in connection with the services Company is providing to, or will provide to, the District, to the extent allowed by E-Verify.
4. Company does not knowingly employ any person who is an unauthorized alien in connection with the Services Company is providing to, or will provide to, the Raytown C2 School District.

FURTHER AFFIANT SAYETH NOT.

By: [Signature] (individual signature)
 For: MGT of America Consulting, LLC (company name)

Title: Executive Vice President

Subscribed and sworn to before me on this 20th day of March, 2020

NOTARY PUBLIC My commission expires:

Nov 11, 2023
Barbara Sisson

See Attached for
Notary Signature & Seal

REQUIRED FORMS



CALIFORNIA JURAT

GOVERNMENT CODE § 8202



A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California

County of Sacramento

Subscribed and sworn to (or affirmed) before me on this 20th day of March, 2020, by
Date Month Year



(1) J. Bradley Burgess

(and (2) _____),
Name(s) of Signer(s)

proved to me on the basis of satisfactory evidence to be the person(s) who appeared before me.

Signature Barbara Sisson
Signature of Notary Public

Place Notary Seal and/or Stamp Above

OPTIONAL

Completing this information can deter alteration of the document or fraudulent reattachment of this form to an unintended document.

Description of Attached Document

Title or Type of Document: Raytown School District - Exhibit A: Federal Work Authorization Program Affidavit

Document Date: 3-20-2020 Number of Pages: 1

Signer(s) Other Than Named Above: _____



©2019 National Notary Association



FEDERAL WORK AUTHORIZATION AFFIDAVIT

(Must be included in sealed envelope)

FEDERAL WORK AUTHORIZATION PROGRAM ("E-VERIFY") ADDENDUM

Pursuant to Missouri Revised Statute 285.530, all business entities awarded any contract in excess of five thousand dollars (\$5,000) with a Missouri public school district must, as a condition to the award of any such contract, be enrolled and participate in a federal work authorization program with respect to the employees working in connection with the contracted services being provided, or to be provided, to the District (to the extent allowed by E-Verify). In addition, the business entity must affirm the same through sworn affidavit and provision of documentation. In addition, the business entity must sign an affidavit that it does not knowingly employ any person who is an unauthorized alien in connection with the services being provided, or to be provided, to the District.

Accordingly, your company:

- a) Agrees to have an authorized person execute the attached "Federal Work Authorization Program Affidavit" attached hereto as Exhibit A and deliver the same to the District prior to or contemporaneously with the execution of its contract with the District;
- b) Affirms it is enrolled in the "E-Verify" (formerly known as "Basic Pilot") work authorization program of the United States, and are participating in E-Verify with respect to your employees working in connection with the services being provided (to the extent allowed by E-Verify), or to be provided, by your company to the District;
- c) Affirms that it is not knowingly employing any person who is an unauthorized alien in connection with the services being provided, or to be provided, by your company to the District;
- d) Affirms you will notify the District if you cease participation in E-Verify, or if there is any action, claim or complaint made against you alleging any violation of Missouri Revised Statute 285.530, or any regulations issued thereto;
- e) Agrees to provide documentation of your participation in E-Verify to the District prior to or contemporaneously with the execution of its contract with the District (or at any time thereafter upon request by the District), by providing to the District an E-Verify screen print-out (or equivalent documentation) confirming your participation in E-Verify;
- f) Agrees to comply with any state or federal regulations or rules that may be issued subsequent to this addendum that relate to Missouri Revised Statute 285.530; and
- g) Agrees that any failure by your company to abide by the requirements a) through f) above will be considered a material breach of your contract with the District.

REQUIRED FORMS



By: 
(signature)

Printed Name and Title: J. Bradley Burgess / Executive Vice President

Principal Owner: A. Trey Traviesa

For and on behalf of: MGT of America Consulting, LLC
(company name)



FIRM PROFILE

BACKGROUND

MGT is a multi-discipline national management consulting and research firm dedicated to serving public, private, and nonprofit clients throughout the United States. For 45 years, our ability to excel has been driven by our expertise, quality, and our commitment to exceeding client expectations. MGT began in 1974 as a small firm started by a group of former public sector administrators to assist public sector clients to operate more efficiently, effectively, and with more accountability.

For four decades, MGT has specialized in helping public education clients achieve success in planning for their long-range needs. We specialize in assisting educational clients in operating more efficiently and effectively. From our extensive experience, we have a deep understanding of school district environments and the trends that impact future enrollment.

MGT has a deep understanding of all aspects of education operations as well as a nationwide library of best practices and trends in achieving efficiency in a landscape of increasingly limited resources. MGT’s clients appreciate and benefit from high-quality quantitative and qualitative analysis, detailed findings, and objective recommendations that are practical and actionable.

Since its founding, MGT has been committed to skillfully, efficiently, and objectively creating solutions to advance each client’s purpose and achieve lasting results. As a full-service management consulting and research firm, MGT has the capacity to provide consulting services to multiple clients. We are nationally recognized for providing customized consulting services, objective research, creative solutions, and quality products that respond to each client's unique needs and environment.

MGT of America Consulting, LLC is a financially stable, national consulting firm with local offices and 100+ staff in 16 states.

MGT of America, Inc. restructured in 2015, becoming MGT of America Consulting, LLC.

MGT Consulting is a privately-held, employee-owned and quickly growing limited liability company with a deep roster of experts and resources.

MGT MAJOR CONSULTING LINES OF BUSINESS



Government Consulting

Everything from an organizational analysis to a jail privatization study to a strategic plan to move an organization from reactive mode to proactive mode.



Diversity and Inclusion

Disparity research and diversity studies to provide an organization or community with a more equitable and inclusive environment.



Financial Solutions

Our nationally-recognized experts help clients weather fluctuating market conditions and rising demands on their budgets using a variety of proven solutions.



Education Solutions

From student outcomes and performance, to operational effectiveness, our solutions have impacted more than 50 million students across the globe.



Human Capital

Specializing in classification and compensation studies, this practice helps public agencies retain and attract the right talent.



Cyber Security | Technology

We help IT and Cyber leaders navigate and manage cyber threats through a Cyber Security Office program that provides an “a la carte” menu for customization.

FIRM PROFILE



Our firm has over **120 professionals and administrative staff** to support our clients' success. MGT's headquarters are in Tampa, Florida with 11 additional offices across the country. Many of MGT's consultants are remote-based employees but the headquarters office will provide the administrative support for this project. The Tampa office has over 25 staff with a full service of administrative support, including our corporate accounting and marketing functions.

NATIONAL FIRM LOCAL FOCUS

CALIFORNIA
Sacramento | Pasadena

COLORADO
Denver

FLORIDA
Tallahassee | Tampa

KANSAS
Wichita

ILLINOIS
Chicago

MICHIGAN
Bay City

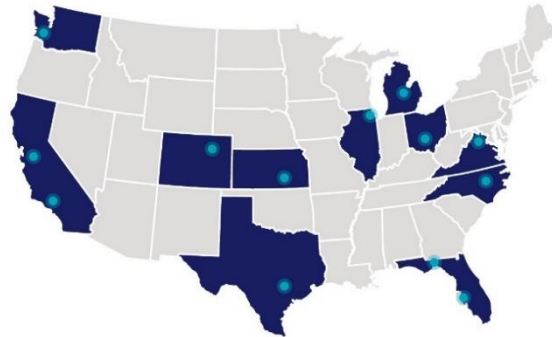
NORTH CAROLINA
Raleigh

OHIO
Columbus

TEXAS
Dallas

VIRGINIA
Richmond

WASHINGTON
Seattle



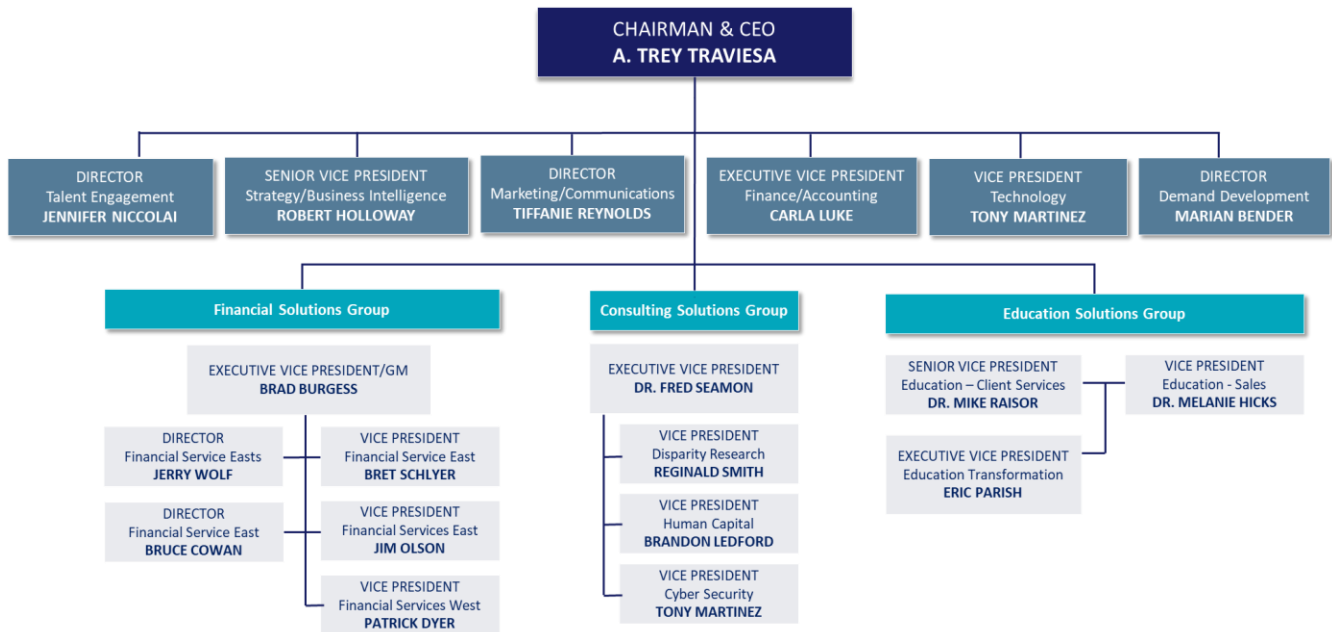
MGT has successfully delivered **more than 12,000 projects** through a careful balance of addressing the immediate needs of our clients, while maintaining the vision and direction towards their long-term goals and monitoring industry best practices. Some of the services MGT has delivered are:

Demographic Studies	Enrollment Forecasting
Community Collaboration	Scenario Planning
Attendance Boundary Analysis / GIS Analysis	Capacity Studies
Facility Master Planning	Fiscal Impact Studies and Models
Facility Optimization and Planning	Educational Technology Consulting
Facility Assessments and Analysis	Educational Specifications / Facility Standards
Operational Reviews of Efficiency and Effectiveness	Program Evaluation

MGT is organized as a Limited Liability Company with business practices led by vice presidents and supported by subject matter expert consultants. All practices are backed by a corporate support infrastructure. The capacity and utilization study will be managed by the Educations Solutions Group, with a project-specific org chart shown in the *Personnel Qualifications* section. We certify that we are a financially sound company and are capable of providing the resources required to complete this project successfully.

MGT provides collaborative and goal-oriented consultation and facilitation services.

FIRM PROFILE



MGT IS UNIQUELY QUALIFIED TO SERVE NORTH KANSAS PUBLIC SCHOOLS



We bring a national perspective. MGT is a national consulting firm that can bring a national, best-practices perspective to this project.



We focus on local issues. We get to know the local community, to understand the District’s dynamics and residents.



We understand PK-12 issues. MGT’s staff come from education and the public sector. We have been administrators, principals, teachers, policy makers, and school board members. Our experience stretches from the classroom to the Statehouse. We understand many of the issues the District is facing, and we understand the complexity of making decisions in the public sphere. We do not come with pre-determined answers, but we have had similar experiences and can ask good questions to help explore the issues, identify relevant data, and help the District develop viable solutions.

Prior to working with education clients as consultants, many of our staff worked in education or government agencies as executives and managers. This insider's knowledge of education structures and processes gives MGT a competitive advantage and an ability to hit the ground running from the very start of a project. We have amassed an extensive library of best practices related to administration, operations, and program development. We have applied this wealth of knowledge repeatedly when working with school districts and have earned a stellar reputation for effecting positive change.

HISTORY OF EXPERIENCE

Our history of long-range planning projects has prepared us to manage the scope of services that the District seeks to accomplish. We have worked with large and small school districts, with both growing and declining enrollments, helping to define immediate and long-term solutions for future planning based in solid analysis of their projections.

FIRM PROFILE



Our staff of professional educators, architects, engineers, community planners, and demographic analysts has worked together on many projects.

MGT's success in the educational sector is rooted in our operating tenets and applies across all our markets. We are recognized as one of the nation's premiere educational consulting firms. Our extensive experience comes from our qualified professionals who apply their expertise across all levels of government and the public sector, which gives us a thorough understanding of structures and operations. Our success is based on the following:



Proven Methodology: Long-range plans must utilize proven methodologies to ensure all aspects are analyzed effectively. We save our clients both time and money that can be reallocated to instructional activities that support student learning.



Project-Team Qualifications: Our proposed project team members have worked together on numerous projects for state, county, and local educational agencies. Our proposed team comes from professional educational and architectural backgrounds and understand the district context.



Objectivity and Flexibility: MGT has no vested interest in profiting from the recommendations as a result of this project and can thus assure our clients of our objectivity. We are receptive to comments or concerns raised by the District and will accommodate any changes necessary to ensure our recommendations are responsive to the district's needs.



Future-Facing: MGT recognizes the changing face of education, as requisite knowledge shifts and desirable goals are reimagined, so students are prepared for a 21st Century workplace. We continue to evolve our tools and baseline methodology so that we are sure we are outfitting our clients with modern solutions to district challenges.

Due to our many years of extensive experience in and across all levels of the public and nonprofit sector, we have an in-depth understanding of organization operations and systems that far exceeds other consulting firms. Our clients quickly recognize that our staff have a detailed understanding of their operations and are confident in our abilities to provide a comprehensive analysis and evaluation. Prior to working as consultants, many of our staff served as administrators and managers in a variety of organizations. This insider's knowledge of organization operations gives MGT a competitive advantage and an ability to hit the ground running from the very start of a project. Our clients appreciate and benefit from high-quality analysis, findings, and recommendations that are practical and achievable, and completed using experienced and seasoned staff.

In addition, there is no material, pending litigation against MGT of America Consulting, LLC that would adversely affect our ability to meet contract requirements pursuant to this RFP, nor is there any litigation that might affect our firm's financial condition.



Part of MGT's success is based upon our promise to be flexible and responsive. We are acutely aware of the political, economic, social, and technological factors that impact today's education clients.



MGT has maintained the highest professional standards throughout our 40-year history. The services that we provide our clients are based in data-driven recommendations and tempered by political and social realities. We measure the success of our efforts by whether or not we meet our client's goals and objectives, and by whether we are able to enhance our client's ability to serve the public.

PERSONNEL QUALIFICATIONS

We recognize the ultimate strength of any strategic planning project we conduct depends on the qualifications and abilities of our project team as well as the structure and organization of the strategic planning process. Our primary goal is to meet the District's needs.

MGT has assembled a team with extensive experience conducting projections analysis. Dr. Melanie Hicks, Vice President, Education Solutions Group, will serve as the Executive-In-Charge over sales and contracting, and Dr. Mike Raisor, Vice President, Education Solutions Group, will serve as Executive-in-Charge over operations and hold final authority for work associated with the project. MGT has a deep roster of experienced consultants and will have no problem filling a position should the need arise.

For the District's Demographic and Enrollment Study, we are proposing a team whose combined skillset and experience align with the scope of services desired and have extensive experience in conducting demographics and enrollment projections in school districts. They understand the educational implications of projection planning for both the school district and its community. As such we felt it was important to assemble a team with the following characteristics:

- ◆ The team is comprised of professionals with extensive knowledge of and experience in K12 education planning and specifications. In addition, two members of our team have experience with urban/city planning from prior to joining MGT.
- ◆ Our individual consultants have a track record of producing quality results. In fact, several team members are considered experts in facilitating planning and visioning.
- ◆ These individuals are experts in planning, organizing, and facilitating inclusive key stakeholder engagement to ensure constructive input and feedback.
- ◆ Experience helping organizations to reach consensus on future direction and transforming vision and goals into realistic, achievable targets.
- ◆ Track record of meeting and exceeding client expectations.

MGT's resumes are included in **Appendix B** Team members shall remain available during the entirety of the project throughout the term of the contract and will work collaboratively with District staff, with each consultant aligning to a specific role that will support the team effort. The personnel described in our proposal are the professionals who will provide the services for this project.

FIRM PROFILE



ROLE ASSIGNED	RESPONSIBILITIES
<p>NORTH KANSAS PUBLIC SCHOOLS PROJECT MANAGER</p> <p><i>MGT suggests that the District appoint a Project Officer to serve as the point of contact between the MGT team and the District.</i></p>	<p>MGT assumes the District Project Officer will hold the following responsibilities:</p> <ul style="list-style-type: none"> – Overall project guidance and directions – Primary responsibility and final authority over all activities – Approval of the contract, work plan, and final report – Receive and distribute all project correspondence, progress reports, and final reports to other key stakeholders
<p>MGT EXECUTIVES-IN-CHARGE <i>Melanie Hicks, Ph.D. (Sales)</i> <i>Mike Raisor, Ph.D. (Operations)</i></p>	<p>The MGT Executives-in-Charge holds the following responsibilities:</p> <ul style="list-style-type: none"> – Ensuring MGT fulfills all contractual requirements. – Managing resources appropriately. – Resolving any conflicts during the project or point of escalation for any challenges. – Final authority over project deliverables.
<p>MGT PROJECT DIRECTOR <i>Nathan Anderson, PE</i></p>	<p>The MGT Project Director holds the following responsibilities:</p> <ul style="list-style-type: none"> – Main point of contact for the District. – Day-to-day management of the project tasks and deliverables. – Oversight over service and deliverable quality. – Management of all project deadlines. – Maintains frequent contact with the District Project Officer throughout the lifecycle of the project.
<p>MGT CONSULTANT TEAM (Primary) <i>Lynda Fender</i> <i>Lara Opheim</i> <i>Rebecca Afshar, LEED AP</i> <i>Nathan Anderson, PE</i></p>	<p>The consultant team holds the following responsibilities:</p> <ul style="list-style-type: none"> – Work closely with the District under the direction of the Project Director to carry out the various tasks and deliverables. – Utilize individual subject matter expertise to customize and execute each work task and fulfill the District’s stated expectations. – Conduct collection and analysis of relevant data including professional development – Review, document, evaluate, and generate recommendations in accordance with each component of the work plan.
<p>MGT SUPPORT TEAM (Secondary Resource)</p>	<p>The MGT Support team holds the following responsibilities:</p> <ul style="list-style-type: none"> – Work closely with the MGT team as needed for secondary back up of all project deliverables.



EXPERIENCE AND PAST PERFORMANCE

MGT has been a leader in the development of school district strategic facility planning for the past 30 years. To be effective, the analysis of district needs must be disciplined and well organized. It must be data-driven and utilize proven methodologies, while also led by educational priorities. Enrollment projections and demographic studies provide a backbone with which a district can prioritize important goals and to follow leads suggested by accumulated findings and stakeholder feedback.

MGT has developed an extensive set of tools and techniques for conducting such engagements and has successfully worked with districts across the country with this methodology. Below is our listing of recent enrollment projection projects with similar needs as Raytown C2 School District.

HENRY COUNTY SCHOOLS
MCDONOUGH, GEORGIA
Classroom Utilization Study
SEPTEMBER 2019 – MARCH 2020
16,778 students | 19 schools

DR. GREG BENTON
ASSISTANT SUPERINTENDENT, POLICY, PLANNING AND
SYSTEMS DEVELOPMENT
33 N. ZACK HINTON PKWY
MCDONOUGH, GA 30253
PHONE: (770) 957-6601
EMAIL: GREG.BENTON@HENRY.K12.GA.US



Scope of Work: Henry County School District (HCSD) commissioned MGT Consulting Group to complete a comprehensive Classroom Utilization Study to identify school facilities that are over or underutilized, and likely to become negatively impacted due to forecasted enrollment growth over the next decade (2019-2029). The information gleaned from this study will afford Henry County Schools the opportunity to strategically develop, plan, and implement a systematic plan of action. Henry County School District’s overall enrollment is at 42,914 with projected enrollments at 44,476 in five years, an increase of 1,562. In ten years, enrollments are forecasted to increase to 45,752, a total of 2,838 potential students over current enrollments.

Apart from Dutchtown High School, most schools have capacity and 8 schools should be monitored over the next five to ten years as they may be approaching space limitations.

Specific services provided included: Demographic analysis, enrollment forecasting, capacity analysis.

EXPERIENCE AND PAST PERFORMANCE



WENTZVILLE SCHOOL DISTRICT
WENTZVILLE, MISSOURI
Demographics and Enrollment Study
DECEMBER 2018 – NOVEMBER 2019
16,400 students | 17 schools

DR. CURTIS CAIN
SUPERINTENDENT
280 INTERSTATE DRIVE
WENTZVILLE, MO 63385
PHONE: (636) 327-3800
EMAIL: CURTISCAIN@WSDR4.ORG



Scope of Work: The Wentzville School District is growing. More people are moving the area every year, and new housing has entered the market to support and attract the growth. Enrollment has consistently grown over the last ten years, leading to over-utilized school buildings. Working with a stakeholder committee of 24 people, MGT is facilitating a process to redraw school attendance boundaries to maximize existing capacity, anticipate the construction of a new elementary school and a new high school in the next three years, and plan for continued growth over the next ten years.

Specific services provided included: Demographic analysis, enrollment forecasting, capacity analysis, stakeholder engagement, community consensus building, attendance boundary redistricting.

MONTGOMERY COUNTY PUBLIC SCHOOLS
ROCKVILLE, MARYLAND
Scenario Planning Model Development
MAY 2017 – Present
159,010 students | 204 schools

ESSIE MCGUIRE
EXECUTIVE DIRECTOR
850 HUNGERFORD DR., RM 149
ROCKVILLE, MD 20850
PHONE: (301) 279-3626
EMAIL: ESSIE_MCGUIRE@MCPSMD.ORG



Scope of Work: The Montgomery County Public Schools hired MGT to recommend a framework for making facility decisions over the next 20 to 30 years. MGT developed a scenario framework based on seven factors that drive enrollment. The resulting scenarios (high enrollment growth, low/moderate enrollment growth, no enrollment growth, and declining enrollment) enable the district to narrow facility planning options over the longer term. The framework was applied to two of the district's 25 clusters where growth is most explosive. Concurrent with developing the scenario planning models, MGT evaluated the district's

enrollment projection methodology and is facilitating the development of a unified, county enrollment projection model for use by both district and county planners.

Specific services provided included: Enrollment scenario planning model development, strategic planning, community engagement and consensus building, enrollment projection and model development.

EXPERIENCE AND PAST PERFORMANCE



ANNE ARUNDEL ECONOMIC DEVELOPMENT CORPORATION
ANNAPOLIS, MARYLAND

*Student Yield Analysis for Anne Arundel County
Public Schools*

OCTOBER 2018 – FEBRUARY 2019
81,379 students | 110 schools

JULIE MUSSOG
PRESIDENT/CEO
ANNE ARUNDEL ECONOMIC DEVELOPMENT
CORPORATION
2660 RIVA ROAD, SUITE 200
ANNAPOLIS, MD 21401
PHONE: (410) 222-7410
EMAIL: JMUSSOG@AAEDC.ORG



Scope of Work: Anne Arundel County Public Schools (AACPS) and Anne Arundel County (AAC), through the Anne Arundel Economic Development Corporation, hired MGT to conduct a student yield analysis. The county and its public schools were struggling to accurately anticipate the number of students that particular housing developments would generate. They needed better student yield factors to support their enrollment projections. Using Geographical Information Systems, MGT conducted a detailed analysis of the students generated by different types of housing. The analysis calculated the number of students generated by single family housing, townhomes, apartments, and condominiums for each of AACPS' 110 schools. Based on these generation rates, AACPS enrollment

trends, and historical AAC population growth patterns, MGT identified areas of the county in greatest need for new capacity (both additions and new school buildings) in the next 0-2 years, 2-5 years, and 5-10 years, based on when new housing is expected to come online. The study's conclusions will help AACPS and AAC prioritize capacity projects.

Specific services provided included: enrollment analysis, housing analysis, student generation analysis, scenario development, GIS mapping and analysis.

LINDBERGH SCHOOLS
ST. LOUIS, MISSOURI

Strategic Planning

JUNE 2016 – DECEMBER 2018
6,677 students | 9 schools

JOEL CRACCHIOLO
CHIEF FINANCIAL OFFICER
9350 SAPPINGTON ROAD
SAPPINGTON, MO 63126
PHONE: (314) 729-2400
EMAIL: JOELCRACCHIOLO@LINDBERGHSCHOOLS.WS



Scope of Work: Lindbergh Schools had a new superintendent. It was time to confirm the existing vision or create a new vision for the district. Lindbergh Schools hired MGT to facilitate the work of a Strategic Planning Committee. The Committee crafted a new district mission statement, vision statement, core beliefs statement, and 5-year strategic goals statement. MGT also conducted a demographics study, a community forum, and an online survey to provide data to inform the work of the Strategic Planning Committee.

Specific services provided included: Strategic planning, community engagement and consensus building, demographic analysis, GIS analysis.

EXPERIENCE AND PAST PERFORMANCE



METRO NASHVILLE PUBLIC SCHOOLS
NASHVILLE, TENNESSEE

Capacity Analysis and School Optimization, Enrollment Projections Update

NOVEMBER 2006 – DECEMBER 2007 &
OCTOBER 2016 – NOVEMBER 2017 &
OCTOBER 2018
84, 069 students | 164 schools

CASEY MEGOW
ASSISTANT DIRECTOR OF FACILITY
PLANNING & CONSTRUCTION
2601 BRANSFORD AVE
NASHVILLE, TN 37204
PHONE: (615) 259-8528
EMAIL: CASEY.MEGOW@MNPS.ORG



Scope of Work: In 2006, the Metropolitan Board of Public Education of Nashville and Davidson County, Tennessee, retained MGT to develop a comprehensive facility master plan update to the 2002 plan. The project included a review of existing studies, data, and information compiled by the Metropolitan Nashville Public Schools.

In 2016, MGT was invited back to provide Metro Nashville Public Schools with a comprehensive facility master plan that identifies and prioritizes the capital needs at each school and provides a budget and schedule for meeting those needs. MGT also facilitated the re-envisioning process to help the district determine strategies for facility planning that would incorporate student outcomes, grade level alignment, distribution of programs, and equity of access. This update will prioritize needs since the 2007 update. MGT was joined in this endeavor by architectural firm, David Mason + Associates, to conduct the condition and site assessments to MGT standards.

Specific services provided included: Condition, site, educational adequacy, and tech readiness assessment, capacity and utilization, demographic analysis, enrollment projection, internal/external stakeholder interviews, community engagement, and cost estimating and prioritization.

In 2017: MGT was selected to facilitate the re-envisioning process to help the district determine strategies for facility planning that would incorporate student outcomes, grade level alignment, distribution of programs, and equity of access.

In October 2018, MGT was engaged to provide updated enrollment projection numbers, based on our previous methodology.

SPRINGFIELD R-12 PUBLIC SCHOOLS
SPRINGFIELD, MISSOURI

Facilities Master Plan & Enrollment Projections Update

FEBRUARY 2016 – NOVEMBER 2016 & APRIL 2018
25,609 students | 55 schools

JOHN JUNGSMANN
SUPERINTENDENT
1359 E. ST. LOUIS ST.
SPRINGFIELD, MO 65802
PHONE: (417) 523-0026
EMAIL: JEJUNGSMANN@SPSMAIL.ORG



Scope of Work: The School District of Springfield, R-12, Missouri, contracted with MGT to develop a long-range Facility Master Plan. The study includes an educational program review of current and future programs to determine facility implications, community engagement, enrollment projections, capacity and utilization analysis, facility assessments, and the development of multiple scenarios to meet the long-range facility needs of the district. MGT was joined in this endeavor by a local architectural firm, David Mason Associates, to conduct the condition and site assessments based on MGT software

and Missouri's Department of Elementary and Secondary Education standards.

2018 Update: In April 2018, SPS engaged MGT to update enrollment projections from the 2018 master plan.

EXPERIENCE AND PAST PERFORMANCE



Specific services provided included: Condition, site, educational adequacy, and tech readiness assessment, capacity and utilization, enrollment projection validation, internal/external stakeholder interviews, community engagement, and cost estimating and prioritization. Additionally, MGT is working with the district to explore efficiency and effective use of school and other facilities within the district.

BOSTON PUBLIC SCHOOLS
BOSTON, MASSACHUSETTS

*Demographics and Enrollment Projection to
support Ten-Year Facility Master Plan*

AUGUST 2015 – NOVEMBER 2016
54,300 students | 120 schools

ALEX PITKIN
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Scope of Work: MGT served on the team that was selected to develop a long-range facility master plan for Boston Public Schools. MGT's role in the process included:

Educational Visioning: MGT staff worked with the District, City, and other project team members to determine the educational program vision that will guide the overall master plan. The results of this process were used to inform the collection of

data, particularly with the educational adequacy assessments, and the development of facility options to meet the educational program vision of the District.

Demographics / Enrollment Projection: The MGT team worked with the district to develop enrollment projection, by school by grade, to use in projecting space needs for the facility master plan. In addition, the projections were used along with GIS mapping to analyze attendance zones and feeder patterns.

Pilot Study: The MGT Team participated with other project team members in conducting a pilot study with three representative schools. The results of this effort were used in conjunction with the visioning process as well as to develop the assessment procedures.

Facility Assessments: MGT staff conducted the educational adequacy assessments of all District schools.

Master Plan Development: MGT staff worked with the District and other project team members to develop master plan options, the recommended master plan, and presentations of the master plan.

STAMFORD PUBLIC SCHOOLS
STAMFORD, CONNECTICUT
Enrollment/Capacity Study

SEPTEMBER 2016 – JUNE 2017
15,990 students | 24 schools

JUDY SINGER
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Scope of Work: In the fall of 2016, Stamford Public Schools (SPS) contracted with MGT Consulting Group to conduct a comprehensive capacity analysis and demographic study, including grade level enrollment and 10-year projections to address the long-term facility needs of the district. Stamford requested MGT to examine the areas of need and determine a course of action to remedy any identified deficiencies.

To that end, MGT collected and analyzed both quantitative and qualitative data around enrollment and building capacity.

EXPERIENCE AND PAST PERFORMANCE



Specific services provided included: Public engagement interviews with 35 key district and community leaders, including district staff, state officials, business professionals and parents, enrollment projection, capacity, based on a range, capacity deficits, regarding specialized classrooms, utilization, final report and presentation

FAIRFIELD PUBLIC SCHOOLS
FAIRFIELD, CONNECTICUT

*Enrollment Projections and Elementary School
Capacity Study & Enrollment Projection Updates &
Demographic Projections*

SEPTEMBER 2010 – DECEMBER 2010 & UPDATES 2011,
2012,2013 & PROJECTIONS 2014
10,182 students | 17 schools

KAREN PARKS
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Scope of Work: MGT contracted with Fairfield Public Schools in September 2010 to assist the district with accurately projecting enrollment and analyzing the capacity and utilization for each elementary school in the district. MGT is currently working on recommendations to help the district alleviate the imbalance in space use at the elementary level and will issue a final report in December 2010.

MGT contracted with Fairfield Public Schools (FPS) in September 2010 to assist the district with accurately projecting enrollment and analyzing the capacity and utilization for each elementary school in the district. FPS contacted MGT in November 2011 to provide an update to the projections provided in 2010.

Specific services provided included: Enrollment projections, capacity and utilization, demographics

PUBLIC SCHOOLS OF BROOKLINE,
BROOKLINE, MASSACHUSETTS

*Enrollment Projection to Support Facilities Master
Plan & Enrollment Projection Update*

JUNE 2008 – JANUARY 2009 &
DECEMBER 2011 – JANUARY 2012
6,875 students | 10 schools

PETER ROWE
PROJECT DIRECTOR (RETIRED)
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Scope of Work: In June 2008, MGT contracted with the Public Schools of Brookline to develop a facilities master plan for the district. Brookline is a small, affluent suburb of Boston and the district adheres to a K-8 model for their primary schools. The school district was experiencing difficulty with finding ways to expand building capacity within the existing space and grade configurations and was looking to ensure that they had the proper educational spaces to accommodate the many special education programs offered. MGT assessed both the condition and suitability of the district's facilities and provided

recommendations to address the capacity and utilization issues. MGT also engaged a very well-informed community as to what they would be willing to support.

2012 Update: MGT contracted with the Public Schools of Brookline in December 2011 to provide an update to the enrollment projection provided when MGT was under contract with the district to develop a facilities master plan.

EXPERIENCE AND PAST PERFORMANCE



Specific services provided included: Physical, educational adequacy, and tech readiness assessment, capacity and utilization analysis, community engagement, and enrollment projection.

MGT PLANNING PROJECTS IN THE LAST FIVE YEARS

Our PK-12 facilities practice started in 1988, and has helped school districts across the country develop or refine standards for educational facilities, assess the impact of current and future educational programs, determine future enrollments and demographics, analyze the capacity and utilization of school buildings, and generate short- and long-range facility scenarios that are educationally sound and community-supported.

DISTRICT/ORGANIZATION	STATE	PROJECT	ENROLLMENT	# OF SCHOOLS
Fulton County Schools	GA	Facilities Master Plan	95,534	107
Atlanta Public Schools*	GA	Facilities Master Plan Needs Assessment	49,796	112
Fairfax County Schools*	VA	Boundary Analysis Consultant	188,556	222
Indianapolis Public Schools*	In	Facilities Optimization	27,630	65
Henry County Schools	GA	Enrollment Projections	42,008	50
Shelby County Schools*	TN	Charter School Impact Study	109,591	219
Mesa School District	AZ	Facilities Assessment and Master Plan	63,444	78
Wentzville School District	MO	Demographics Study	16,400	17
Hamilton County Schools	TN	Facilities Master Plan and Enrollment Projections	44,446	78
North Bend School District	OR	Facilities Assessment	4,411	5
Hickman Mills School District	MO	Facilities Master Plan	6,238	15
Aurora Public Schools	CO	Strategic Planning	42,249	63
Anne Arundel Economic Development Commission	MD	Student Yield Analysis for Anne Arundel County Public Schools	73,565	121
Portland Public Schools*	OR	Facilities Assessments	48,345	85
Montgomery County Public Schools	MD	Educational Cluster Facility and Growth Management Plan and Enrollment Forecast	156,380	206
Guilford County Schools	NC	Capital Improvement Plan	73,151	125
Jefferson Parish Public School System	LA	Capital Improvement Plan	47,817	98
Ferguson-Florissant School District	MO	Facilities Master Plan	11,092	24
Laramie County School District 1	WY	Facilities Assessment Update	14,029	38
Metro Nashville Public Schools	TN	Facilities Master Plan	84,069	164
Milwaukee Public Schools	WI	Facilities Master Plan	77,316	167
Pasco School District	WA	Facilities Master Plan, Phase I and II	17,100	20
Springfield R-12 School District	MO	Facilities Master Plan & Enrollment Projections Update	25,609	55
McAllen Independent School District	TX	Comprehensive Audit of McAllen ISD Facilities Maintenance and Operations	25,217	34
Savannah-Chatham County Public Schools	GA	Educational Suitability Assessment	37,445	58
Kenton County Public Schools	KY	Facilities Planning Services	14,698	25
Andover Public Schools	MA	Development of a Comprehensive Facility Master Plan for Andover Public Schools	6,110	10 11 town buildings

EXPERIENCE AND PAST PERFORMANCE



DISTRICT/ORGANIZATION	STATE	PROJECT	ENROLLMENT	# OF SCHOOLS
Boston Public Schools	MA	Ten-Year Facility Master Plan	55,114	119
Rapid City Area Schools	SD	Comprehensive Facilities Master Plan & Facility Master Plan Update	13,533	26
DeKalb County Public Schools	GA	Master Planning Services	99,775	155
Lyon County School District	NV	Master Facility Planning	8,075	19
Anne Arundel County Public Schools	MD	Strategic Facilities Utilization Master Plan - 10-Year Update	73,565	121
Kansas City Public Schools	MO	Master Planning Services	16,832	35
Sweetwater Union High School District	CA	Facilities Master Plan	37,344	24
Carroll County Public Schools	MD	Facilities Utilization Study	27,334	49
Spring Independent School District	TX	Facilities Assessment	36,323	39
Wichita Falls Independent School District	TX	District-wide Site & Facilities Assessment	14,621	32
Fresno Unified School District	CA	Facilities Assessment Update & Long-Range Facilities Master Plan	74,833	106
Houston Independent School District	TX	Facilities Assessment	204,245	307
Eugene School District 4J	OR	Master Plan Update and Facility Assessments	17,475	43
Public Schools of Brookline	MA	Enrollment Projections Update & Facilities Master Plan	6,008	10
Fremont Unified School District	CA	Facilities Assessment	32,304	41
Kentucky Department of Education	KY	Facilities Inventory and Classification System	N/A	484

**Currently in progress*



REFERENCES

MGT presents five references from our current or past clients within the past five years with a similar scope to that of the District and who are familiar with our processes and can attest to our work products.

WENTZVILLE SCHOOL DISTRICT
Demographics and Enrollment Study

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MONTGOMERY COUNTY PUBLIC SCHOOLS
Scenario Planning Model Development

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ANNE ARUNDEL ECONOMIC DEVELOPMENT
CORPORATION *Student Yield Analysis for Anne
Arundel County Public Schools*

JULIE MUSSOG
PRESIDENT/CEO
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SPRINGFIELD R-12 PUBLIC SCHOOLS
*Facilities Master Plan & Enrollment
Projections Update*

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FAIRFIELD PUBLIC SCHOOLS
*Enrollment Projections and Elementary
School Capacity Study & Enrollment
Projection Updates & Demographic
Projections*

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METHODOLOGY AND APPROACH

APPROACH AND METHODOLOGIES

The underlying goal of this study is to conduct a comprehensive demographic and enrollment projection study of the school district community and produce a report with recommendations to guide long-range strategic planning for facility use optimization and educational programming equity. This report will include enrollment projections and a facility use analysis.

Enrollment Analysis: MGT begins each demographic and enrollment analysis by examining the current data and information available through the District. While enrollment has grown over some years in Raytown C2 School District, various changes of demographics and funding is still a driving force for overall balancing of enrollment and programs across buildings throughout the District. Therefore, accuracy of projections with review of previous enrollment, demographic data impacting future enrollment, and capacity and utilization data will be very important data to gather.

Facilities Capacity: Next, MGT will want to verify and validate current and future building capacity and utilization by physically walking the spaces on-site to see them firsthand. At MGT we have a philosophy that capacity is not a number but a decision. Meaning, each day principals and staff make decisions that impact capacity which ultimately impacts utilization. The key is to create a process where these decisions are made in a collaborative framework using the best thinking of all parties to maximize the limited resources available.

Demographic Information: Next is a comprehensive review of demographic data, to examine growth trends and how they may impact student program offerings in the District. Some demographic data will illustrate growth of the area (housing developments, housing trends, population density trends, land use pattern). Other demographic data will frame future market needs and how those demands may stress the District. Examination of anticipated industry workforce needs, economic development factors analysis, and a market demand and job trend review will make a broad picture roadmap for the District that they can use to equip their decision-makers.

Final Report: Finally, our final recommendations and report will reflect all the data gathered throughout the course of the project. It will be a culmination of extensive data gathering and trend analysis and shifted through our experienced professionals so they can make observations and recommendations that benefit Raytown C2 School District for years to come.



DATA GATHERING AND REVIEW

Quantitative data analysis includes population data, housing data, birth data, historical enrollment, racial and ethnic information, socio-economic data, household information, population age structure, and immigration data. This data forms the underlying foundation for a robust demographic study. We will compile the quantitative data into charts, tables, and graphs. We will geocode and map the data to enhance our analysis and create visual tools for communicating our analysis to the Raytown community. With GIS, we will analyze the existing boundary conditions to create scenarios that will help the District achieve its goals. We will pull the data apart and look at it from different perspectives to draw out themes and conclusions for implications on future enrollment. We view the quantitative data as pieces to a puzzle that must be understood and put together in different ways to understand the meaning within the data.

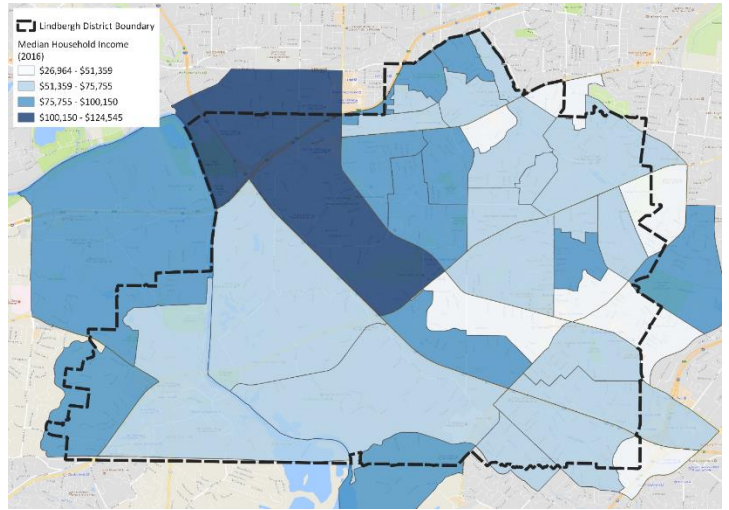


Figure 1: Lindbergh Schools Median Household Income map

Qualitative data analysis is equally important to quantitative data analysis. Qualitative analysis provides context for the facts and figures. We will engage school district officials, local government representatives, and other local stakeholders who are familiar with trends and community dynamics. These conversations will help us understand why the numbers say what they say. We get to know the Raytown community. We do not analyze data from a distance and in a vacuum.

The combination of quantitative and qualitative data analysis will inform the conclusions within our study and the design of our enrollment projection methodology.

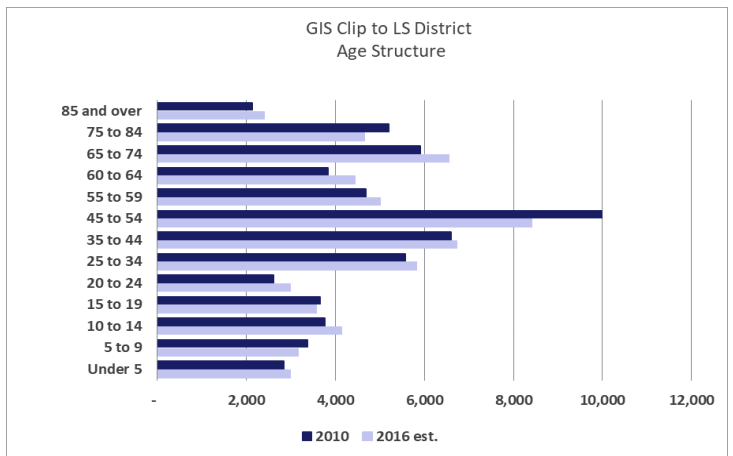


Figure 2: Lindbergh Schools Age Structure



GEOGRAPHIC INFORMATION SYSTEMS (GIS)

GIS turbo-charges demographic and enrollment decision-making. Placing students based on residence and moving students to address crowding, travel time, demographic differences, etc. is much easier to model and understand when GIS technologies are in place. We understand that studies like this must take into consideration a host of social and economic factors, including:

- ◆ Enrollment (current and projected)
- ◆ Travel times for pedestrian accessibility.
- ◆ Travel times for school bussing.
- ◆ Diversity (minority enrollment)
- ◆ Income disparities (percentage students receiving free and reduced-price meals)
- ◆ Neighborhood cohesiveness
- ◆ School feeder patterns
- ◆ Access to specialty programs (pre-K, Special Education)
- ◆ School district properties (existing schools, vacant lands)
- ◆ Planned residential growth patterns and developer entitlement commitments

Each of these factors has a spatial component and can be analyzed geographically. Our team has used a variety of GIS technologies to analyze these types of factors for public- and private service districts in the past. We currently utilize a variety of GIS software including QGIS, PostgreSQL, Carto and AutoDesk products.

The project will begin with the development of background data drawn from stakeholders and the creation of an understanding of the current state of the district. From the provided data, our analysis will be able to create a picture of historical enrollment and any magnet, ELL, special education, or special assignment programs that may be offered across a district. This data will provide insight into choice, transportation, and socioeconomic patterns within the district area. For the example in **Figure 4** the goal was to provide a school district and our team with a complete picture of school attendance that included:

- ◆ Number of students that live and attend within the enrollment boundary
- ◆ Number and percent of students that choice-in to the school

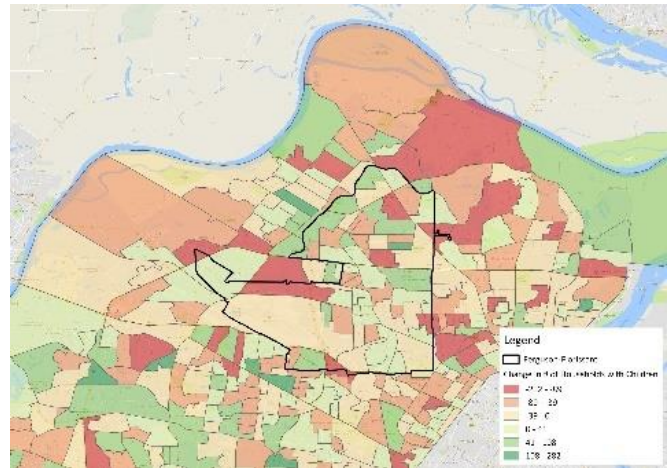


Figure 3: Ferguson Census block map. GIS maps allow us to analyze where the changes in school-age population are occurring within the district.

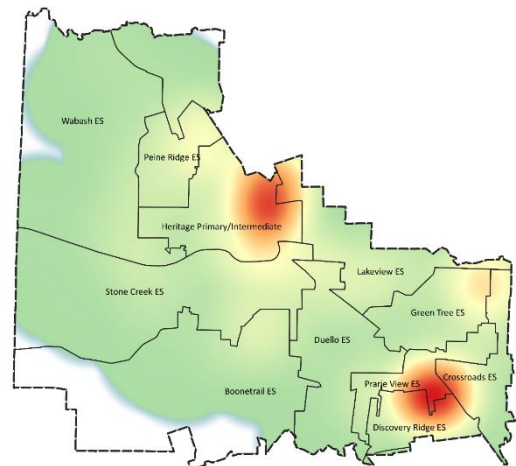


Figure 4: Heat maps enable us to analyze intensity of data, e.g., where students live relative to their school of choice, concentration of poverty, etc.

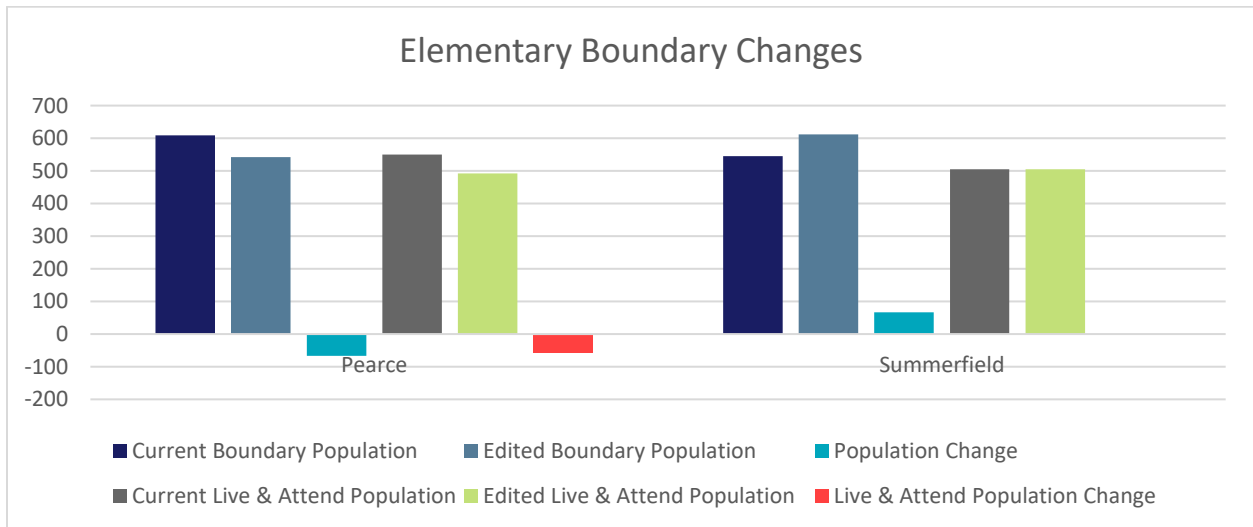


- ◆ Number of students that live in the boundary
- ◆ Number and percent of students that do not attend their assigned boundary school
- ◆ Number of magnet students attend the school
- ◆ Number of special assignment students
- ◆ Average distance traveled of all students
- ◆ Average distance traveled of students that live and attend within the enrollment boundary
- ◆ Average distance traveled of students that choice-in to the school
- ◆ 10-year projections by school by grade
- ◆ Current and projected building utilizations

In this example, once we created complete picture, we narrowed down the schools or programs that posed a financial burden on the district from either transportation costs (high average distance traveled) or underutilization of a building. We also analyzed the popularity of magnet programs in the district and the types of magnet programs (STEM, arts, language immersion, etc.) to identify geographic gaps in program supply and demand. After schools and boundaries were identified for optimization, we used our GIS boundary adjustment tool. This tool allows us to redraw attendance boundaries in real time and calculates changes to the school population by showing the existing student population and the edited student boundary population.

Figure 5 is an example that shows the results of enrollment boundary changes.

Figure 5



While the previous example may not be exact for the District, it gives an idea of the scope of tools MGT can bring to bear for Raytown C2 School District.

ENROLLMENT PROJECTION METHODOLOGY

An enrollment projection is an *estimate* of future activity based on the historical data and information provided. To identify trends and prepare for adequate spaces, teaching staff and materials and supplies,



educational leaders can use several methods of projecting enrollment. **MGT utilizes four base models: Average Percentage Increase, Cohort Survival, Linear Regression, and Student-per-Housing Unit.** MGT generates a weighted average of these four “base” models to arrive at its enrollment projection. A weighted average allows the analysis to reflect all of the trends observed in the historical data and the over-arching themes from the qualitative information gathered in this process. The weighted average also works to maximize the strengths of each of the base models.

AVERAGE PERCENTAGE INCREASE MODEL

This model calculates future school enrollment growth based on the historical average growth from year to year for each grade level. This simple model multiplies the historical average percentage increase (or decrease) by the prior year’s enrollment to project future enrollment estimates. For example, if enrollment in the first grade decreased five percent from 2000 to 2001 and decreased seven percent from 2001 to 2002, then the average percentage change would be a six percent decrease, and six percent would be the factor used to project future enrollment in this base model.

LINEAR REGRESSION MODEL

This model uses a statistical approach to estimate an unknown future value of a variable by performing calculations on known historical values. Once calculated, several future values for different future dates can then be plotted to provide a trend line or “regression line”. MGT has chosen a “straight-line” model to estimate future enrollment values, a model that finds the best fit based on the historical data.

COHORT SURVIVAL MODEL

This model calculates the growth or decline in a grade level over a period of ten years based on the ratio of students who attend each of the previous years, or the “survival rate”. This ratio is then applied to the incoming class to calculate the trends in that class as it “moves” or graduates through the school system. For example, if history shows that between the first and second grades, the classes for the last ten years have grown by an average of 3.5 percent, then the size of incoming classes for the next ten years is calculated by multiplying them by 103.5 percent. If the history shows a declining trend, the multiplying factor would be 100 percent minus the declining trend number.

The determination of future kindergarten enrollment estimates is critical, especially for projections exceeding more than five years. There are two methods of projecting kindergarten. The first model is based on the correlation between historical birth rates (natality rates) and historical kindergarten enrollment. Ideally, birth data will be geocoded to the mother’s household, but if the District is unable to supply this level of detail, the number of births per household in a geographic area will be created using county level birth data and household counts from Census data. The second model uses a linear regression line based on the historical kindergarten enrollment data.

STUDENTS-PER-HOUSEHOLD MODEL

This last model utilizes the estimated number of households as its base data. Using the housing unit data and historical enrollment data, MGT created a *student generation factor* (SGF) for each projected housing unit. By taking the total enrollment by grade level and dividing it by the current housing levels, a student generation factor was calculated for each grade level. This factor indicates the number of students within each grade level that will be generated by each new housing unit. By using GIS, we can analyze student generation factors by housing type and home value at the elementary, middle and high school boundary level.

Once each of these four base models has been calculated, MGT generates a weighted average of each of the models. A weighted average allows the analysis to reflect all the trends observed in the historical

METHODOLOGY AND APPROACH



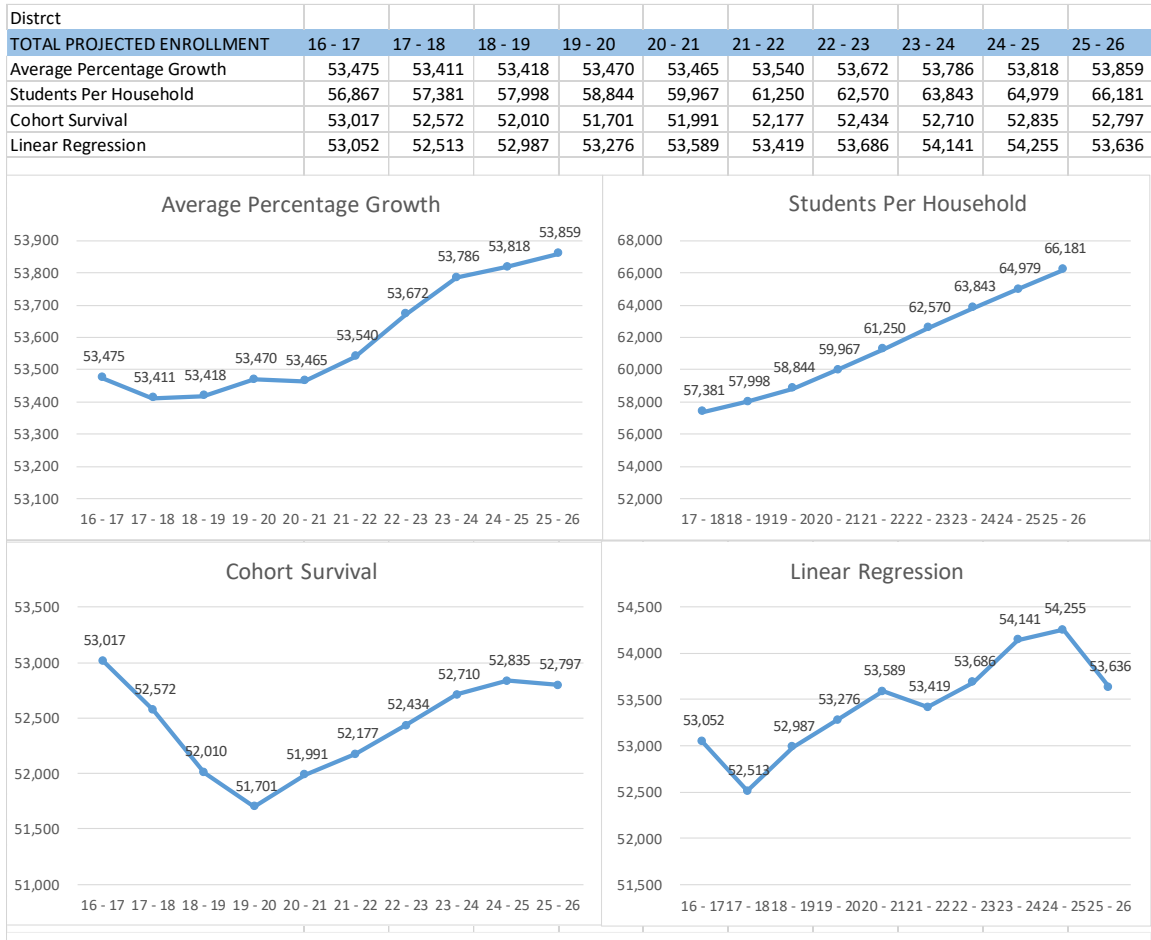
data and the over-arching themes from the qualitative information gathered in this process. The weighted average also works to maximize the strengths of each of the base models.

Two models, the Average Percentage Increase Model and the Linear Regression Model, emphasize historical data. These models are quite effective predictors if there is no expectation of unusual community growth or decline and student population rates have minimal fluctuation.

The Cohort Survival Model also uses historical enrollment numbers but takes into account student-mobility patterns and the effects of the natality rates in prior years. The Cohort Survival Model is perhaps the best-known predictive tool using this type of data. However, like the Annual Percentage Annual Increase Model and the Linear Regression Model, the Cohort Survival Model loses its predictive capabilities in communities that experience, or are expecting to experience, more rapid growth or rapid decline.

The Students-Per-Household Model allows the planner to consider projections for housing developments and general growth in the town. This model looks forward and is based on the input from local planners. MGT works with local planners to examine projected and planned growth scenarios to ascertain the most likely impacts to enrollment. The planning information is important, and the District will want to continue to monitor this information. **Figure 6** on the following page illustrates these four models.

Figure 6 Enrollment Projection Models Illustrated



METHODOLOGY AND APPROACH



To prepare projections for each school, MGT will include such factors as historical live birth data, kindergarten capture rate, live birth to kindergarten correlation coefficient, historical permit data, and housing student generation rates as input. These factors will help generate projections that are tailored to Raytown C2 School District.

Figure 7 Sample Model Comparison and MGT Weighted Projection Model

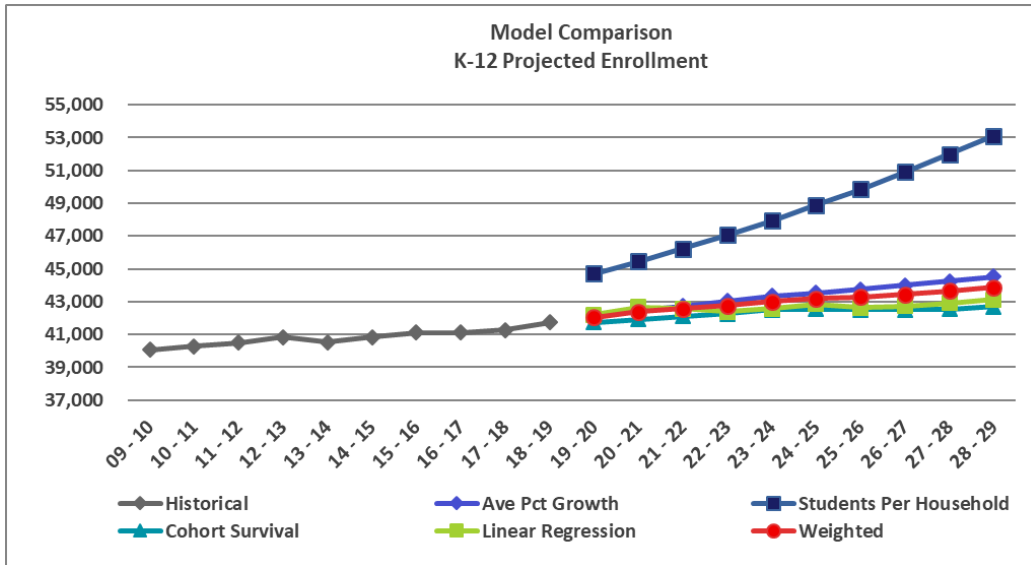
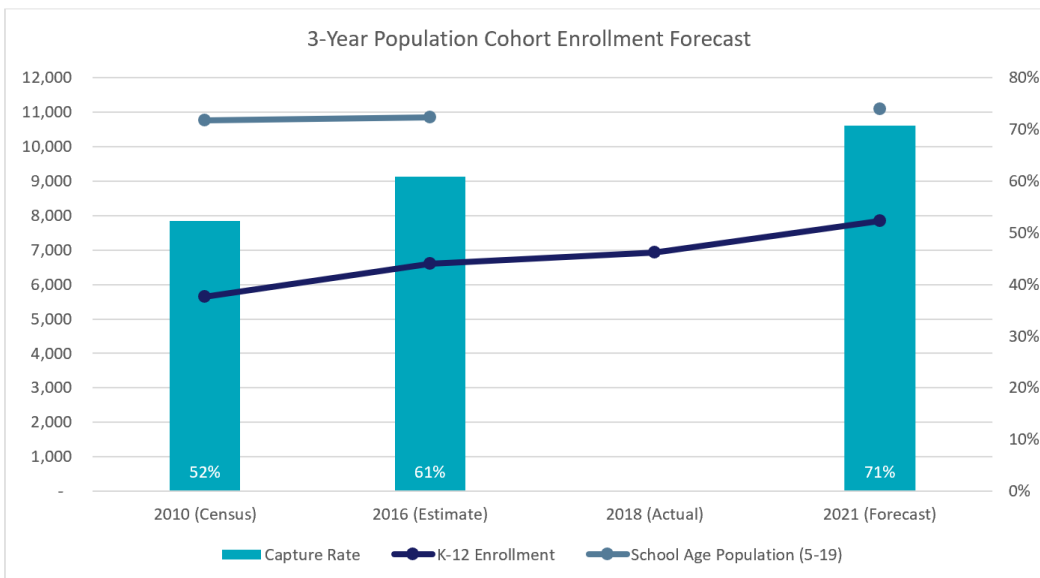


Figure 8 Sample Cohort Enrollment Forecast

3-YEAR POPULATION COHORT ENROLLMENT FORECAST



We take pride in our ability to provide accurate projections with the data we work with. **Figure 9** on the following page is a sampling of our past projection accuracy.



Figure 9 MGT Accuracy of Past Projections with Actual Enrollments

Client	Percent Difference	Years of Comparison
Metro Nashville Public Schools, TN	-0.13%	10
Lincoln Public Schools, NE	2.41%	10
Walla Walla School District, WA	1.20%	10
Jackson Public Schools, MS	1.41%	10
Clark County Schools, GA	-3.70%	10
Anne Arundel County Public Schools, MD	-2.00%	11
Citrus County Schools, FL (COFTE)	6.85%	11
Ft Wayne Community Schools, IN	-2.42%	10
Desoto County Schools, FL	-1.38%	11
Norfolk Public Schools, VA	-1.79%	10
Lyon County School District, NV*	26.68%	7
Smyth County Schools, VA	5.23%	9
Rapid City Area School District, SD	-1.73%	9
Uniontown Area School District, PA	9.78%	9
Shepherd Schools, MT	-0.04%	9
Connellsville Area Schools, PA	7.48%	9
Brookline Public Schools, MA	-10.07%	9
St Louis Public Schools, MO	-11.48%	9
Douglas County School District, NV	1.00%	7
Arlington Public Schools, VA	-4.79%	8
Citrus County, FL (Membership)	6.36%	7
Fairfield Public Schools, CT	2.43%	7
Dekalb County Schools, GA	-0.20%	7
Fairfield Public Schools, CT	-0.29%	2
Brookline Public Schools, MA	0.41%	6
Fairfield Public Schools, CT 2012 Update	-0.60%	5
Wichita Falls ISD, TX	-0.14%	5
Fairfield Public Schools	-0.09%	4
Anne Arundel County Public Schools, MD	2.38%	3
Lyon County School District, NV	-0.51%	2
Boston Public Schools, MA	1.58%	1
MGT Accuracy of Projections to Actual Enrollment	3.67%	

*LCSO only used the Students per Housing Unit model for projections.

EDUCATIONAL CAPACITY

Part of developing an understanding of the current state of the District will be calculating the capacity of each high school in the district. This capacity calculation will help for balancing student enrollment, as capacity is more than just a number, it is an educational decision impacting learning.

An educational facility's *functional capacity model* is defined as the number of students the facility can accommodate based on the instructional program. More specifically, a school's capacity is the number of students which can be accommodated given the specific educational programs, the class schedules, the student-teacher ratios, and the size of the rooms. The *utilization rate* of a facility is calculated by



dividing the current or projected enrollment of the educational facility by the capacity. The utilization rate is used to determine if the facility has excess space or if it is lacking sufficient space for the given enrollment.

The *functional capacity* used by MGT is calculated using the *Instructional Space Model*. This model counts the number of the various types of instructional rooms and multiplies that number by the maximum students-per-room or the *loading* factor to identify the gross capacity for the school. The gross capacity is then multiplied by a scheduling factor, which considers the realities of how the space is used. Typically, not all classrooms are scheduled for every period at a middle school or high school. For example, high school students move from room to room and enroll in a variety of courses. As a result, some rooms will sit empty or will be less than fully occupied at any given time. Teacher preparation periods will also contribute to rooms not being used for instruction at a particular time. Therefore, based on the programs and scheduling in place at schools, MGT can use a 75% scheduling factor at the middle schools and the high schools. Elementary school rooms have a much more static and consistent daily use so MGT used a 90% scheduling factor for the elementary schools. This 90% factor accounts for the difficulty that often occurs in scheduling classes to precise counts. In addition, some elementary program spaces (music, art, etc.) have no capacity due to the scheduling process most often used. Students move from their home room to the program space, so no increased capacity is available.

Using these underlying, educational program-driven assumptions, we calculated the capacity of each school in this sample. **Figure 10** illustrates the calculation of the capacity at this sample district's high school.

Figure 10 Sample Capacity Calculation

ROOM TYPE	NUMBER OF CLASSROOMS X	STUDENTS/ CLASSROOM	= CAPACITY
Secondary Classroom (6-12)	103	28	2,884
Secondary Advanced Placement (7-12)	0	25	0
Science Lab Classes (Secondary)	16	25	400
Computer Lab Assigned (Secondary)	3	28	84
Computer Lab Drop-In (Secondary)	3	0	0
Art (Secondary)	2	24	48
Band (Secondary)	1	35	35
Choir / Orchestra (Secondary)	1	24	24
CTE (Secondary)	4	24	96
PE (Secondary)	5	28	140
ROTC (Secondary)	1	24	24
Special Ed - Self Contained (Secondary)	4	10	40
Special Ed - Resource (Secondary)	3	0	0
Gross Capacity (w/o scheduling factor) =			3,775
x High School scheduling factor of			75%
High School Capacity =			2,831

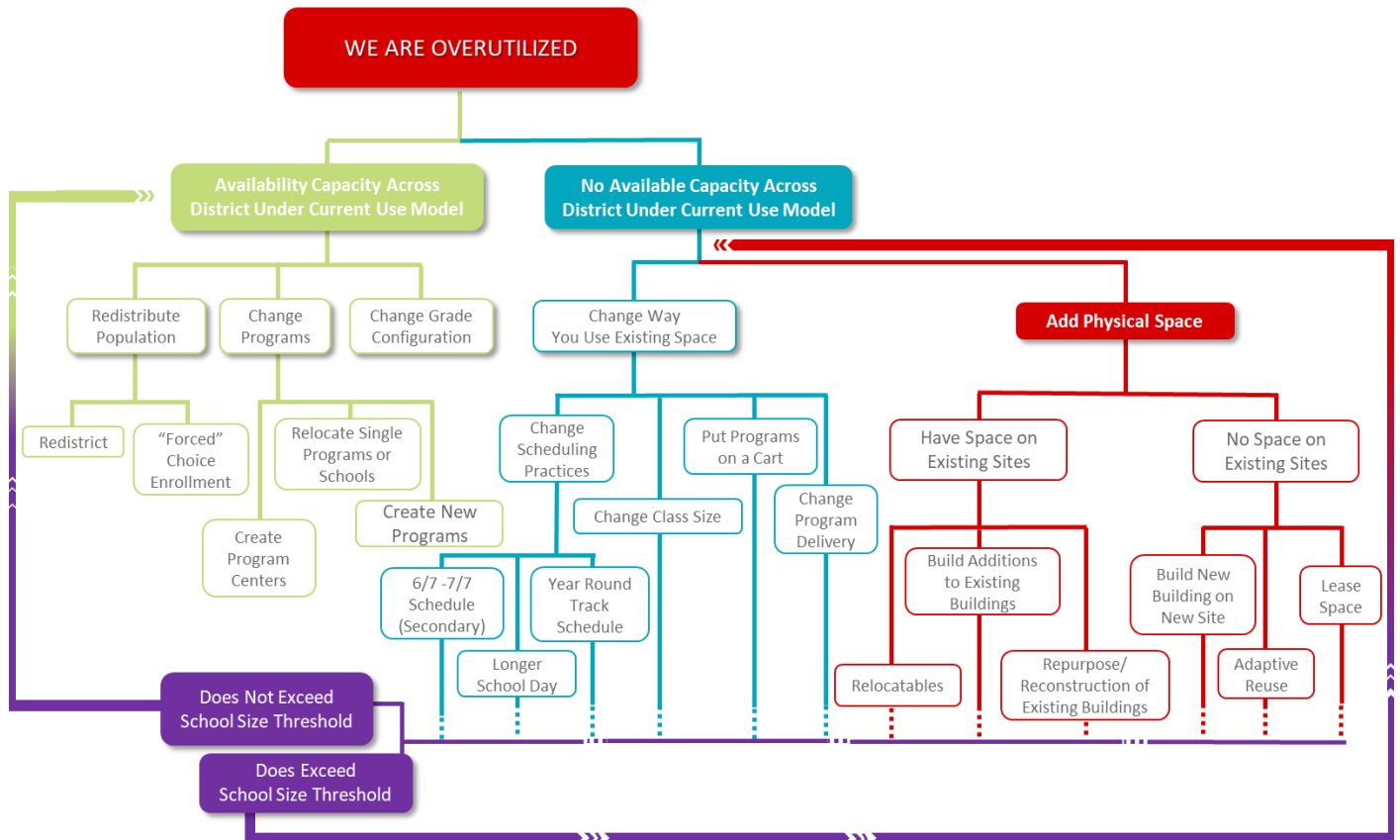


Capacity decisions are not always definitive. Sometimes limitations and variables muddy solutions and seem to trap a district in indecision. In 2009, Arlington Public Schools (APS), VA, hired MGT to conduct a capacity study. Specifically, APS needed a solution to address capacity issues amidst rapidly increasing enrollment. Some limitations, such as the division not wanting to issue any more bonds to fund construction and redistricting not an option, stymied actionable proposals forward. In a division with a highly educated populace, division officials found themselves at a loss for the “silver bullet” to address their capacity problems, so they turned to MGT.

MGT determined that the “solution” for APS was not a specific set of facility recommendations. Rather, it was a process for thinking about facility capacity solutions and a recognition that school capacity is a decision, not a definition. How a building is used determines its capacity. The APS community needed to understand that the list of available solutions was not infinite. The community also needed to understand that some solutions did not involve new capital investment. Some merely required a change in programs or scheduling. The solution could be noncapital in nature. Finally, the community needed to understand that certain decisions or circumstances eliminated or reduced available capacity options.

To provide APS with a framework for making capacity decisions, MGT developed the following decision flowchart.

Figure 11 Capacity Framework

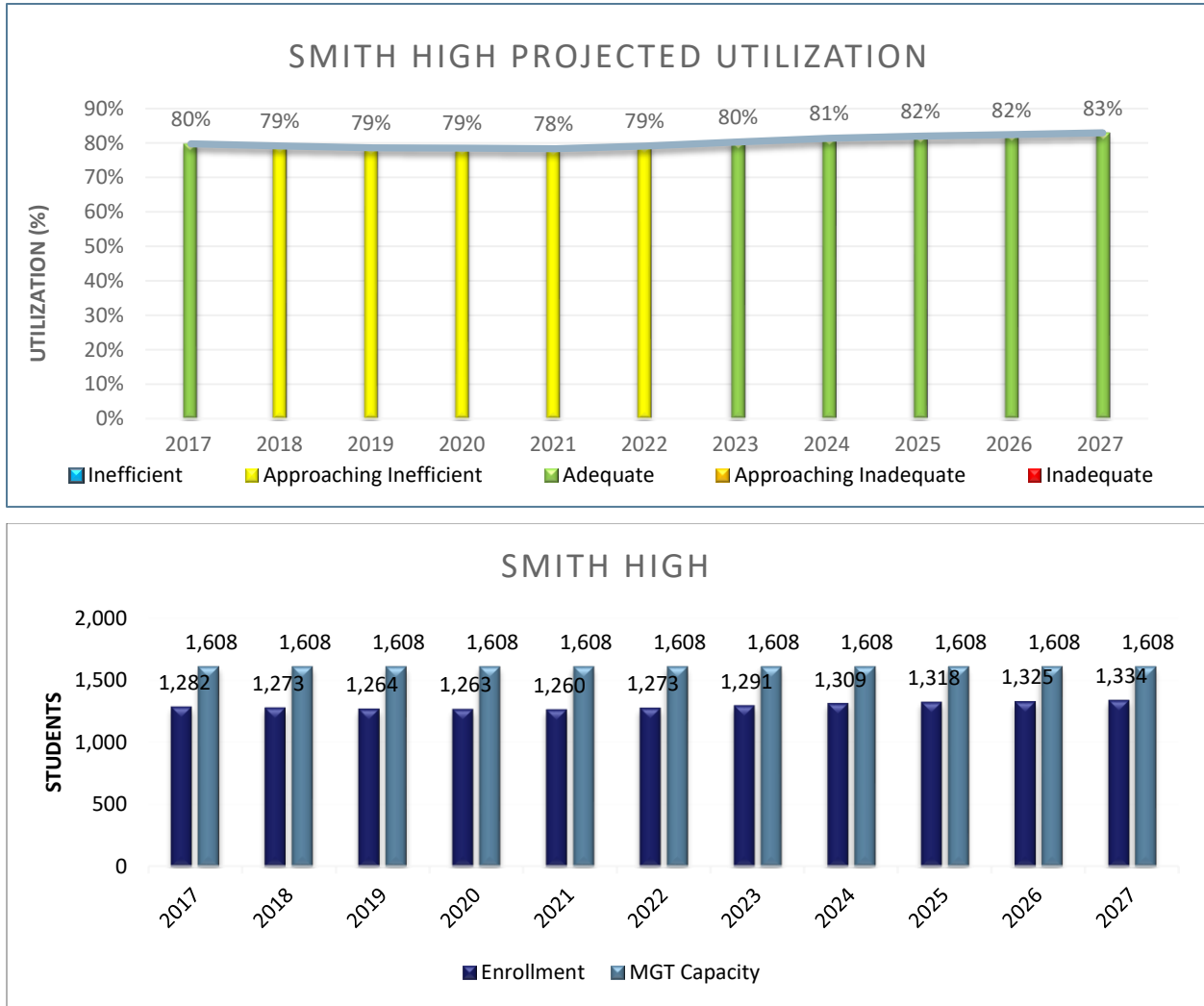




The flowchart on the previous page is a powerful tool for identifying and prioritizing capital projects to address capacity and over-utilization issues in a school district. The power comes from the flowchart’s ability to facilitate collaboration among stakeholders as a district acts in response to rapidly increasing enrollment.

The following **Figure 12** is an example of school-level capacity and utilization data and how the data can be organized and presented to stakeholders for ease of evaluation and analysis.

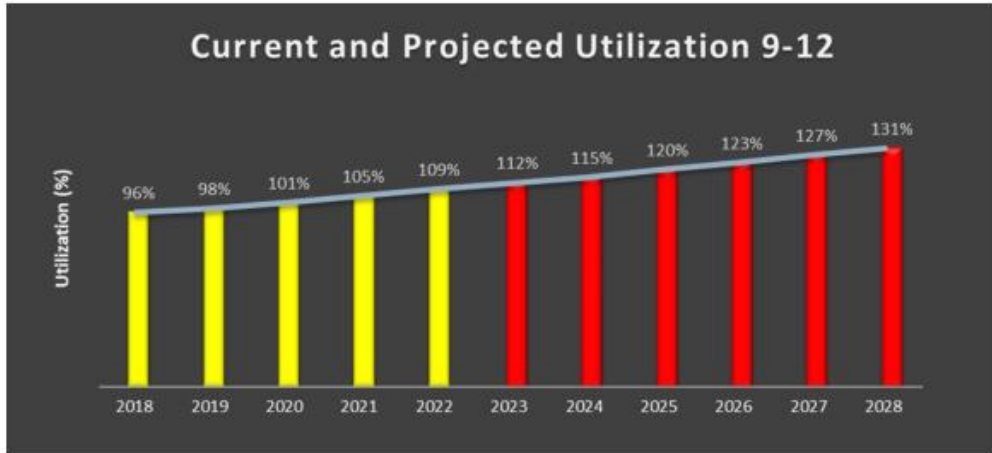
Figure 12 Sample Capacity and Utilization Data



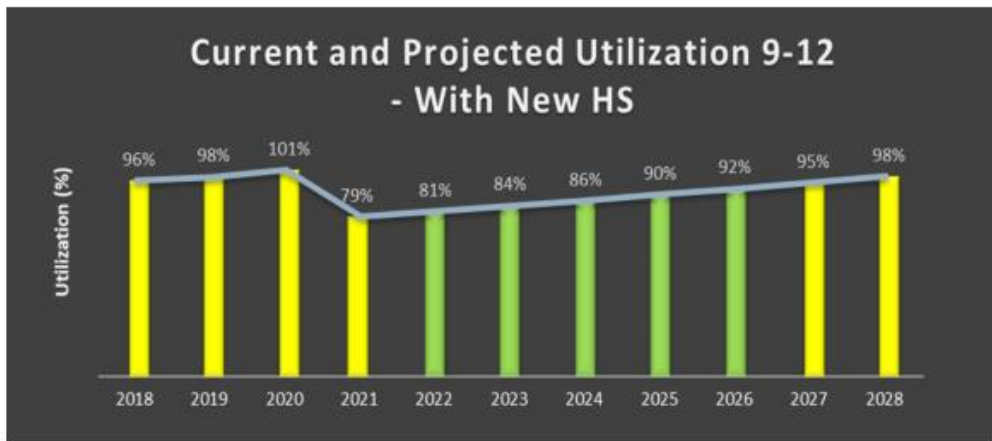
With the capacity of the district schools in hand and an understanding of the current and future state of the District, we will work with the District to develop a demographic analysis of future needs within the community and how that may impact future programming.

Figure 15 Sample Utilization Scenario

Without
New HS



With
New HS



OPTIONAL COMMUNITY ENGAGEMENT

While the RFP does not outline a request for external community engagement, MGT would like to offer this as an optional service, as we have found that external feedback, especially when reviewing boundaries, is important in guiding a community through change.

MGT places a broad emphasis on district and community feedback. We do not provide data and solutions in a vacuum. Therefore, part of what makes MGT a powerful partner is our communication feedback. As part of our work plan, we build in data review with stakeholders within the administration, to ensure the data we are working with is built on a sound base and can build in review with the external community, as both groups are interested and affected by possible boundary changes and they need to know that their concerns are heard and recorded.

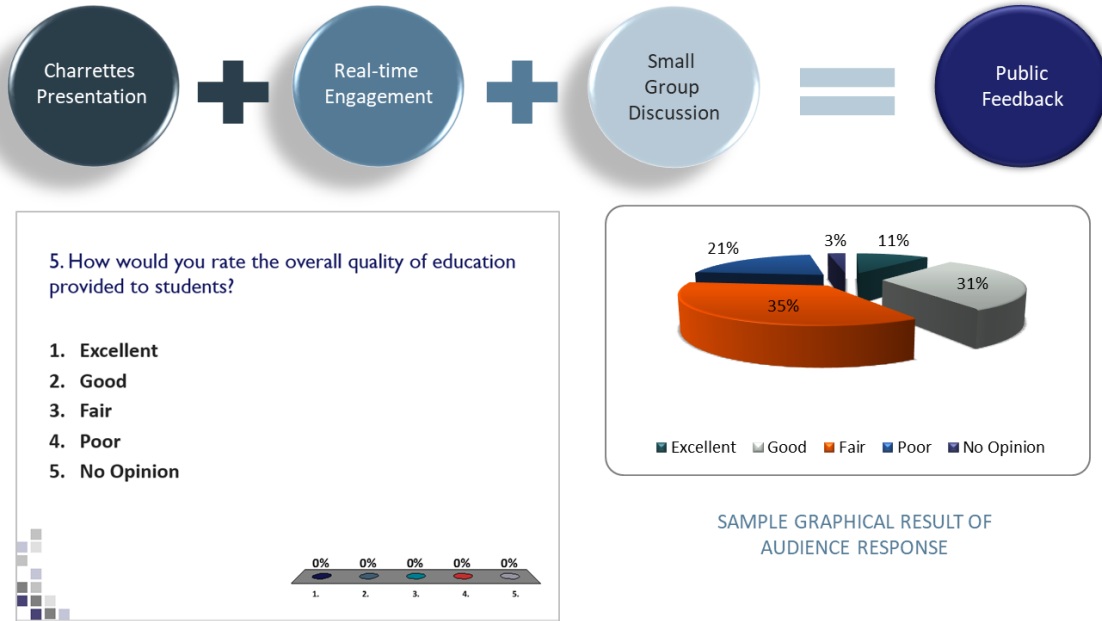
Engaging the community is the most dynamic part of the planning process. We find that having an open “conversation” with the parents and citizens about the needs





and priorities for the facilities is the best way to ensure a successful plan gets implemented. Today’s technology offers a variety of methods to have this conversation and to communicate with the community about the study.

Figure 16 Sample Public Engagement Process



MGT has successfully planned and implemented community engagement plans for large and small, urban, suburban, and rural school districts throughout the country. We will work to ensure the plan is responsive to local needs, sensitivities, and issues, and to ensure community stakeholders understand the process and are given ample opportunity for information and participation. MGT's experience with communities undergoing potential change and strong local knowledge gives us context and a solid basis for working with the Raytown community. We employ a variety of strategies to reach the community. Some options work better in certain situations to reach particular demographics and sometimes multiple options are used to increase access.

- ◆ **Public Charrettes (or public meetings)** – A large-group presentation with live polling features and small group facilitation.
- ◆ **Online Polls** – Online survey offered either separately or in tandem with a public meeting.
- ◆ **Focus Groups** – Specific groups of stakeholders that can be interviewed by MGT staff.
- ◆ **Interviews** – One on one conversations with a stakeholder.
- ◆ **Virtual Telephone Town Halls** – Real-time interactive meetings which utilize telephone conference call, television, and/or online technologies to broadcast meetings.
- ◆ **Internet strategies** – Online options, such as webpages, a blog, a poll, or social media platforms.

If desired, MGT will facilitate one (1) community engagement for the District. This community meeting will display the preliminary enrollment and capacity projections. This session will provide a forum for discussion and provide an up-close change to review and understand how these models could impact the district. This type of data display will enhance the efficiency of the process and eliminate the delay between gathering input and generating new models.



Over the course of our master planning project work across the country MGT has conducted community and stakeholder engagement meetings ranging in size from 10 – 1500 attendees. We find the most successful approach is to organize teams of 20-25 people led by a trained MGT facilitator, to break down the data and information into smaller more consumable pieces so that a meaningful discussion can evolve and inform the process. We have used a variety of models in this approach and have even trained district personnel to assist in the process, which brings local knowledge and understanding into the process and allows ownership of the information to reside with the District.

FINAL RECOMMENDATION AND REPORT

Our final recommendation and report will reflect all the data gathered throughout the course of the project and any feedback received. After the data has been collected and analyzed for trends, MGT will develop a series of charts, tables and reports showing the enrollment projections, capacity, and utilization of each school as well as district-wide, demographic breakdowns of markets, economic growth, housing growth, and industry growth patterns.

The final report will include recommendations based on data collected that will help shape academic and career preparation opportunities in the District. This report will serve as a roadmap to direct the District's future growth with informed decision-making based on firm data and experienced planners who understand how to translate growth numbers into academic need for a community.

We will present the final report and recommendations to the District and other interested stakeholders as requested.

QUALITY CONTROL

With thousands of data points from previous reports to even on-site reviews, we recognize that rigorous procedures and constant monitoring are necessary to ensure near-perfect consistency in data collection, interpretation, and recording.

We believe client participation during the process is an important QC practice for understanding the process, data collected, and evolving findings, as well as schedule control and real-time conformance with project objectives. We review the data and draft reports with the client to verify that our quality control measures lead to consistent and accurate products that meet (or exceed) contract requirements.

We will make exhaustive efforts to provide Raytown C2 School District with the kind of product that is desired. This will be accomplished by adhering to the following guidelines:

- ◆ Clearly identify and document project objectives and deliverables with the District prior to the commencement of the project.
- ◆ Submit a draft and final work plan from which to manage the study and based on any revisions made by staff review.
- ◆ Provide opportunity for prior submittal and approval of formats for deliverables, including progress reports, final deliverables, and presentations.
- ◆ Maintain frequent contact with District staff to identify any problems and design appropriate solutions.
- ◆ Solicit feedback throughout the study on cadences set by the finalized work plan.
- ◆ Submit draft plan for review and comment prior to final issuance.

It is MGT's commitment that all deliverables will meet or exceed District expectations.



WORK PLAN

The work plan is the document we use to monitor our activities internally and keep the planning process on schedule. It also serves as the basis from which the District’s designated project leader can track the progress of the planning process. MGT has developed a set of key tasks/activities that are described on the following pages. The tasks encompass all the deliverables outlined in the RFP and also include the timeline to complete with associated deliverables.

The following tasks identify the activities MGT proposes to undertake to deliver a Demographic and Enrollment Study for Raytown C2 School District.

NOTE: In light of the current COVID-19 pandemic, we have adjusted our workplan to take advantage of any potential opportunity for virtual interactions, thereby limiting onsite travel and by proxy travel related budgeted expenses. Should travel bans be lifted and the District desire additional onsite work, a new budget to include additional travel can be provided.

TASK 1.0 – PROJECT INITIATION

ACTIVITIES:

- ◆ Schedule and conduct initial project kickoff meeting (via phone) with the District Project Manager and appropriate stakeholders.
- ◆ Review key project objectives, expectations, communication protocols, and reporting requirements.
- ◆ Discuss timing of project data collection and stakeholder input activities relative to the District’s events/schedules, and the roles and responsibilities of the Project Manager and the MGT team.
- ◆ Collect and review initial District data, recent survey data, prior reports, plans, and other source documents pertinent to the study and the target region. (MGT will submit a data request for source documents that are not available on the District’s website. For an example, please see ***Appendix A Information for District to Provide.***)
- ◆ Finalize specific conditions, responsibilities, and time frames for on-site visits and project tasks.
- ◆ Set up project SharePoint site and FTP site for data transfer.
- ◆ Adjust work plan and corresponding timelines (if necessary) and submit for final approval.

DELIVERABLE:

- ◆ Project Kickoff Conference Call
- ◆ Final Work Plan and Schedule.

TASK 2.0 –SCHOOL DISTRICT DATA COLLECTION AND ANALYSIS

ACTIVITIES:

- ◆ Gather school district information, including:
 - Current school capacities
 - Current school enrollment and enrollment policies
 - Planned new school construction, additions and renovations to existing facilities



- Current elementary/middle/high school boundaries
- Current student transport data
- Grade level configurations
- Elementary attendance zones
- School year schedule
- Reconfiguration and/or addition history or policies
- Program participation
- ◆ Gather community information, including:
 - City and county population/demographic study
 - U.S. Census data, including live birth, age/gender, racial structures
 - Land-use data, including location of and potential student generation from approved new housing developments and redevelopments
 - Parcel data
 - Private/parochial school enrollment
- ◆ Obtain updated floorplans of all buildings to confirm capacity. If floorplans are deemed outdated, phone interviews with principals will be conducted to virtually walk through current status.
- ◆ Compile data into tables, charts, and graphs to identify themes that emerge from the data.
- ◆ Obtain historical geocoded district student data.
- ◆ Compile and analyze housing development data.
- ◆ Analyze planning area data for students entering and leaving the district.
- ◆ Analyze the impact of housing types and income on student yields.
- ◆ Prepare demographic and income profiles for district.

DELIVERABLE:

- ◆ District demographic analysis with relevant charts, tables, maps, and other visual tools, to be included as part of the Final Report.

TASK 3.0 – ENROLLMENT PROJECTIONS

ACTIVITIES:

- ◆ Using themes identified from the data analysis, determine appropriate enrollment projection model weighting.
- ◆ Prepare 10-year enrollment projection by school and grade for the District.
- ◆ Plot projections via GIS in maps to visualize trend development.
- ◆ Geocode students by zip code and/or major subdivisions.
- ◆ Review enrollment projection forecasts with District staff via phone.

DELIVERABLE:

- ◆ 10-year enrollment projections by school and grade for the District, to be included in Final Report.

TASK 4.0 – CAPACITY AND UTILIZATION PROJECTIONS

ACTIVITIES:

- ◆ Meet (virtually) with District staff and review capacity formula(s).
- ◆ Using enrollment projections and calculated capacities, determine the utilization rates of each facility. Review utilization rates with district staff and determine scale for optimum utilization. Track utilization rates within each of the attendance area options.
- ◆ Prepare building capacity and utilization analysis.

DELIVERABLE:

- ◆ Building utilization and capacity analysis by school for District, to be included in the Final Report.

TASK 5.0 – COMMUNITY ENGAGEMENT (OPTIONAL)

ACTIVITIES:

- ◆ Work with District to conduct 10-15 phone interviews with stakeholders and the District leadership to identify issues and priorities.
- ◆ Prepare presentation materials regarding the major issues for use in public input meetings (charrettes) and other public presentations.
- ◆ Work with District to conduct one (1) charrettes to inform stakeholders of the study and seek input regarding the major strategies and options that affect the District.
- ◆ Conduct an online survey that contains the same polling questions as the community charrette.
- ◆ Review results of community engagement process with District staff and leadership.

DELIVERABLE:

- ◆ Stakeholder engagement feedback, summary to be included with final report.
Site Visit #1 for community forum.

TASK 6.0 – COMPREHENSIVE DRAFT AND FINAL REPORTS

ACTIVITIES:

- ◆ Based on feedback from stakeholders and data collected, prepare report of the study with methodology, findings and supporting data identifying market trends, industry growth, and other demographic trends, as well as district policies such as enrollment or school year schedule policies. Outline possible best location(s) if future facilities would be needed or closed. Include suggestion of possible attendance boundary changes if necessary.
- ◆ Prepare draft report containing appropriate charts, tables, and graphs of data to illustrate and explain the analysis and conclusions drawn therefrom.



- ◆ Develop recommendations regarding projections, capacity and utilization analysis.
- ◆ Following review of the draft report by District officials, make revisions and edits as appropriate and deemed necessary. Incorporate into Final Report.

DELIVERABLES:

- ◆ Comprehensive draft report, provided virtually for review.
- ◆ Comprehensive final report, with 20 hardcopies and one PDF.
- ◆ Virtual presentation of final report.

TASK 7.0 – PROJECT MANAGEMENT

ACTIVITIES:

- ◆ Manage the project in concert with District stakeholders to ensure smooth communication and quality control.
- ◆ Work with the District to designate a single client-side point of contact and establish understanding of contextual constraints and opportunities.
- ◆ Apply various project management methods and techniques.
- ◆ Establish a framework of firm timelines and milestones with the District, based on unique circumstances and needs.



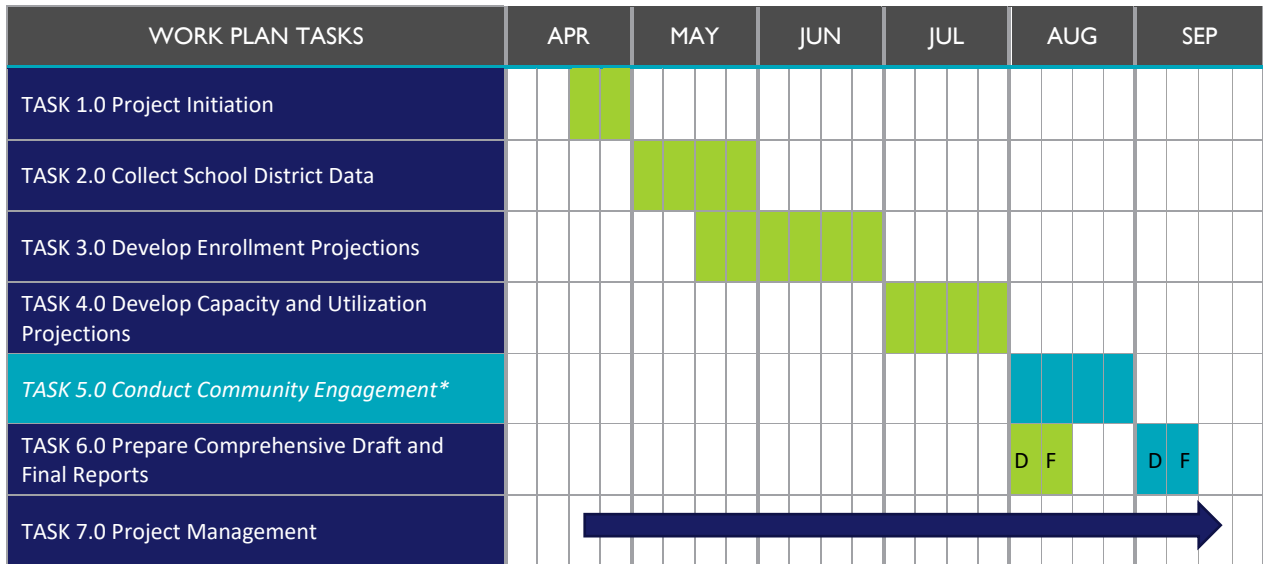
DELIVERABLES:

- ◆ Regular communication and updates
- ◆ Deliverable quality control

PROPOSED TIMELINE

The proposed project schedule for our work plan is shown below, based on desired dates by the District. The optional community engagement task is shown in this schedule, to give an idea of when we would solicit community feedback and how it would affect tasks after it. If no community engagement is desired, the anticipated end of the project would move up a month.

During Project Initiation, firm dates for tasks will be discussed and decided upon, based on factors such as District staff availability, testing windows, and other variables.



*Anticipated on-site visits.

D=Draft report; F=Final report



APPENDIX A - INFORMATION DISTRICT TO PROVIDE

MGT will establish project meeting updates with district staff to collaborate and share information on project progress. MGT foresees the District personnel assistance with providing data, being available for questions regarding data, and reviewing the data. Providing the data from the data request list (example list shown below) should happen within the first three weeks of the project launch, to provide enough time for review and analysis. We would ask that the District personnel be available by email or phone during Task 2.0 of the project. If staff are unavailable due to holiday, we ask that they have a suitable and knowledgeable replacement available. Last of all, the District staff should be available for draft report feedback, prior to submission of the final deliverable.

MGT DATA LIST

- ◆ School site level data
- ◆ Current enrollment of each school, by grade.
- ◆ Historical enrollment (10 years) by school, by grade.
- ◆ Projected (10 year) enrollment of each school, by grade
- ◆ District enrollment boundary map(s) showing all schools and attendance zones.
- ◆ Enrollment feeder pattern list
- ◆ Historical non-public school enrollment (10 years) by district by grade.
- ◆ Historical home school enrollment (10 years) by district by grade
- ◆ 15 years of resident live births by district or county if the district resides in one county
- ◆ 10 year housing unit (building permit) history by district or county if the district reside in one county
- ◆ District calculated capacity by school
- ◆ GIS data
- ◆ Population data, by age structure, school-age, and future school-age population
- ◆ Gender data, by male and female populations, and female child-bearing age population
- ◆ Race and ethnicity data, by White, Black, Hispanic, Other Races, and Foreign-born populations
- ◆ Median household income
- ◆ Unemployment
- ◆ Owner-occupied homes
- ◆ Households with children
- ◆ Education background
- ◆ Any adopted policies mandating the number of instructional spaces in schools
- ◆ Mission, vision, values of the district

MGT DATA REQUEST LIST

MGT routinely requests a data list at the project kick-off. For the timeline of this project, we would request this data within first three weeks from project kick off in order to make the anticipated project deadlines. If any other specific data need should arise, MGT will reach out to the District contact as soon as possible to request it in order to not impact timelines.

A. School Data (in Excel)



i. Site Level Data

Description
Site Name
Site Number
Site Address
City
Zip Code
Primary Contact Name at Site
Contact email
Contact Phone Number
Site Size (acres) - Displays up to 2 decimal places
Number of parking spaces at site - Optional
Grade Configuration K-12, K-5, 9-12, etc.
Total GSF (Gross Square Footage)

B. Demographic Data (in Excel)

i. **From School**

1. Current enrollment of each school, by grade.
2. Historical enrollment (10 yrs) by school, by grade.
3. Projected (10 year) enrollment of each school, by grade. If available.
4. PDF Files of District enrollment boundary map(s) showing all schools and attendance zones.
5. Enrollment Feeder Pattern List (i.e. Elementary schools X, Y, and Z Feed ABC Middle School). If students are split and sent to two different feeder zones, indicate approximate percentage of students going to each zone. Example tables below

Example Elementary Feeder %

ES Feeder	% of students going to:	MS Feeder
Bancroft ES	99%	Doherty MS
	1%	West MS
South ES	75%	Doherty MS
	25%	West MS
West ES	60%	Woodhill MS
	40%	West MS
Sandborn ES	50%	Woodhill MS
	50%	West MS
High Plain ES	100%	Woodhill MS

Example Middle Feeder %

MS Feeder	% of students going to:	HS Feeder
West MS	100%	Andover HS
Woodhill MS	75%	Groves HS
	25%	Islands HS
Mercer MS	10%	Islands HS
	90%	Beach HS
Doherty MS	100%	Islands HS



- 6. Historical Non-Public School Enrollment (10 yrs) by district by grade. If available.
- 7. Historical Home School Enrollment (10 yrs) by district by grade. If available
- ii. **From Planning Agency**
 - 1. 15 years of resident live births by district or county if the district resides in one county
 - 2. 10 year housing unit (building permit) history by district or county if the district reside in one county
- C. GIS Data – If Available**
 - i. ArcGIS 9.2 compatible files (shape files)
 - 1. **From District/Planning Agency**
 - a. Layer a – GIS files showing Elementary School Enrollment Boundaries
 - b. Layer b – GIS files showing Middle School Enrollment boundaries
 - c. Layer c – GIS files showing High School Enrollment boundaries
 - d. Layer d – GIS files showing location of each school facility
 - e. Layer e – GIS files geocoded current students - showing location of each school age student by grade level and school of attendance. (if available include gender, ethnicity, Title 1 status, free reduced lunch status, etc)
 - f. Layer f - GIS files geocoded historical students - showing location of each school age student by grade level and school of attendance. Preferred minimum of 5 years. (if available include gender, ethnicity, Title 1 status, free reduced lunch status, etc.)
 - g. Layer g – GIS files- parcel data
 - h. Layer h - GIS files - county boundary
 - i. Layer i - GIS files – streets
 - j. Layer j - GIS files - water features
- D. Space Utilization – If Available**
 - i. District calculated capacity by school
- E. Strategic Vision for the School District**
- F. Academic Vision for the School District** (examples – Prek program, CTE, Technology initiatives, etc.)
- G. Any adopted policies mandating the number of instructional spaces in schools** (i.e. each school site must have a special education classroom, or each elementary school must have at least one Prek classroom)



APPENDIX B – RESUMES



MELANIE HICKS, Ph.D.

Vice President, Education Solutions Group

MGT CONSULTING GROUP



Dr. Hicks has more than 18 years of higher education and public policy experience. Prior to joining MGT, Dr. Hicks served as Assistant Provost and Director of Sponsored Programs for the University of Tampa (UT) where she created UT’s first Office of Sponsored Programs, led campus wide faculty initiatives, and assisted with the development and mentoring efforts of the UT Lowth Center for Entrepreneurship. Additionally, she was a member of the master planning and budgeting senior staff committee and responsible for 52 academic department budgets and millions in restricted funds. Finally, she led strategic assessments and return-on-investment evaluations on both the operating and capital needs of campus programs. She continues to mentor students by teaching courses in Comparative Politics and Social Entrepreneurship.

Prior to joining UT, she founded InPursuit Consulting and Research Institute offering consulting on strategic planning, organizational development, grant writing/implementation, and advocacy volunteer training in the fields of entrepreneurial and small business, start-ups, and nonprofits.

Dr. Hicks also previously served as the Director of Research for the Independent Colleges and Universities of Florida (ICUF), and concurrently as the Managing Director of the Florida Independent College Fund (FICF). Dr. Hicks began her career in local and state government policy advocacy working on behalf of clients before the Miami-Dade County Commission and eventually moving to Tallahassee to become the first Aide to Mayor John Marks. While in Tallahassee, she served as a special projects coordinator with the State Legislatures’ Florida Office of Program Policy Analysis and Government Accountability and as an adjunct professor of Public Administration for Florida State University and Barry University. Among her published works is a chapter in *Moc Ideja*, a grassroots policy manual written for policymakers in Bosnia and funded by the U.S. Department of State. She also has numerous works on psychological contract theory.

AREAS OF EXPERTISE

- | | |
|----------------------------|---|
| Higher education | Strategic planning and organizational development |
| Financial management | Program/Grant evaluation |
| Needs assessment | Instructional design, training, and teaching |
| Public policy and advocacy | Grant acquisition, administration, and evaluation |

EDUCATION

- Ph.D., Askew School of Public Administration and Policy, Florida State University, 2007
- M.P.A., Public Administration, Business emphasis, University of Miami, 2002
- B.A., Organizational Communications; minor Public Administration, University of Central Florida, 2000
- Business Certificate, Harvard Business School, 2017

RELEVANT PROJECT EXPERIENCE - MGT

Higher Education

- | | |
|---|---|
| American University at Virginia State (VA) Online MBA Feasibility Study | Research Corporation of University of Hawaii Early Childhood Facilities Evaluation and Cost Analysis Needs Assessment |
| Bowie State University (MD) Student Housing Study | State College of Florida (FL) Strategic Planning |
| College of Lake County (IL) Market Demand Study | SUNY Stony Brook University (NY) Student Housing Study |
| Colorado State University (CO) Technology Strategic Plan | Towson University (MD) Student Housing Study |
| Guilford Technical Community College (NC) Training | University of Louisiana, Lafayette (LA) Student Housing Study |
| Henderson State University (AR) Student Housing Study | University of Nebraska, Kearney (NE) Student Housing Study |
| InterAmerican University of Puerto Rico (PR) Market Demand Study | |
| Louisiana State University (LA) Student Housing Study | |



MELANIE HICKS, Ph.D.

Vice President, Education Solutions Group
MGT CONSULTING GROUP



Northwest Florida State College (FL) | Student Housing Study
Nova Southeastern University (FL) | Health Professions
Division Expansion Feasibility Analysis; Health
Professions Division Predictive Modeling and Risk
Assessment
Palm Beach Atlantic (FL) | Student Housing Study
Palm Beach State College (FL) | Needs Assessment

PK12 Education

Gary Community School Corporation (IN) | School
Turnaround, Communications
Hamilton County Schools (TN) | Facilities Master Plan:
Enrollment Projections
Henry County Schools (GA) | Utilization Study
Jefferson County Schools (CO) | Policy Review
Laramie County Schools (WY) | Strategic Plan

RELEVANT PROJECT EXPERIENCE – PRIOR MGT

CASA (Court Appointed Special Advocates) | Advocacy
Training
Children’s Athletic Network and Dance Opportunities |
Organizational Turnaround
CrimeStoppers of Florida | Advocacy Training
EduMatrix | Grant Evaluation
Elite Fire | Fundraising
Eunoia Collective | Grant Writing
Florida Holocaust Museum | Grant Writing
Florida Independent College Fund | Program Needs
Assessment
General Board of Higher Education Ministry | Higher
Education Benchmark Study
Gulf Coast Jewish Family and Community Services |
Strategic Plan

University of Nevada, Las Vegas | Strategic Planning
and New Program Development
University of North Carolina System (NC) | Needs
Assessment
University of Northern Iowa (IA) | Student Housing
Study
University of Tennessee (TN) | Needs Assessment
Millington Municipal Schools (TN) | Facilities Master
Plan
Portland Public Schools (OR) | Educational Suitability
Assessment
Research Corporation of Hawaii (HI) | Early Childhood
Shelby County Schools (TN) | Charter School Review
Research Corporation of the University of Hawaii (HI) |
Early Learning Childhood Needs Assessment
Wake County Schools (NC) | Instructional Review

Habitat for Humanity, Pasco County | Strategic Plan
Habitat for Humanity, Pinellas County | Strategic
Plan
Habitat for Humanity, Sarasota | Strategic Plan
Heart Gallery, Pinellas and Pasco | Strategic Plan
Horn Lake High School | Fundraising
MomPreneur | Copy Editing
Patel Campaign for County Commission |
Communications Advisor
Rowan University | Grant writing
SEEDSPOT | Workshop/Event Facilitator
University Area Community Development
Corporation | Grant Writing
University of South Florida | Copy Editing



MICHAEL RAISOR, Ph.D., MBOE, LSSBB

Senior Vice President of Client Services for Education Solutions Group
MGT OF AMERICA CONSULTING, LLC



Dr. Michael Raisor is a proven executive and dynamic leader with 24 years of experience. He has a breadth and depth of experience and knowledge in leading effective teams with his extensive project management experience. He is both a strategic thinker and tactical practitioner with a track record of success. Dr. Raisor focuses on relationship-building, collaborating, and communicating as pathways to successful project management. He is committed to innovation, entrepreneurial thinking, and world class systems. In his leadership in school systems, he has led by creating well-articulated processes and being systems-focused. He also considers decisions by focusing on the core impact of the work and remembering that long term reward is more important than short term gain. Dr. Raisor is a Lean Six Sigma Black Belt with a strong business foundation specializing in operational excellence, systems thinking, change management, and performance improvement.



AREAS OF EXPERTISE

- ◆ Project management
- ◆ Lean Six Sigma Black Belt
- ◆ Change management

EDUCATION

Masters of Business Operational Excellence (MBOE),
Ohio State University, 2011

Ph.D., Educational Leadership, Indiana State
University, 2011

Ed.S., Educational Leadership, Indiana State
University, 2008

M.S., Educational Leadership, Indiana University,
2001

B.S., Social Science Education, Indiana State
University, 1995

EXECUTIVE EDUCATION

The National Institute for Urban School Leaders –
Harvard Graduate School of Education (2008)

The Turnaround Leadership Program – University of
Virginia Darden School of Business (2008)

Disney's Approach to Leadership Excellence – The
Disney Institute (2011)

Taking People With You – YUM! Brands Executive
Training (2013)

The Public Education Leadership Project – Harvard
Business School (2014)

Executive Management Program – McDonough
School of Business Georgetown University (2015)

RELEVANT EXPERIENCE

Indianapolis Public Schools (IN) | Facility and
Academic Suitability Assessments

Hamilton County Schools (TN) | Facilities Master Plan

Shelby County Schools (TN) | Charter School Review
Research Corporation of University of Hawaii | Early
Childhood Facilities Evaluation and Cost Analysis

Needs Assessment

WORK EXPERIENCE

Jefferson County Public Schools, Chief Operations Officer, March 2012 – November 2019

Bellarmine University, Adjunct Faculty, Annsley Frazier Thornton School of Education, August 2013 – May 2014

Indiana State University, Special Faculty, Bayh College of Education, April 2012 – May 2015

Evansville Vanderburgh School Corporation, Executive Director, Office of Operational Excellence, October
2011 – March 2012

Evansville Vanderburgh School Corporation, Deputy Chief Operating Officer, Office of Operations, July 2010 –
September 2011

Evansville Vanderburgh School Corporation, Project Manager, Office of Superintendent, November 2009 –
January 2012

Evansville Vanderburgh School Corporation, Social Studies Teacher, Perry Heights Middle Schools, July 2001–
June 2005



MICHAEL RAISOR, Ph.D., MBOE, LSSBB

Senior Vice President of Client Services for Education Solutions Group
MGT OF AMERICA CONSULTING, LLC



Evansville Vanderburgh School Corporation, Principal/Assistant Principal, Harwood Middle Schools – Title I,
July 2005– June 2010

Evansville Vanderburgh School Corporation, American Government Teacher, Harwood Middle Schools – Title
I, July 2005– June 2010

Evansville Vanderburgh School Corporation, Social Studies Teacher, Lanesville Junior/Senior High I, July 2005–
June 2010



NATHAN ANDERSON, PE

Engineering/Civil Engineering, Education Solutions Group
MGT CONSULTING GROUP



Mr. Anderson has worked on projects for local and state agencies, private developers, and PK12 school districts across the U.S. Mr. Anderson recently joined MGT as a facility assessor, with a specialty focus on school building condition and site assessments, as part of larger assessments or facility master planning. His previous background as an engineer gave him a strong eye for facility needs and standards. As an engineer with his previous company, David Mason & Associates, his responsibilities include stormwater drainage, water quality design, quantity estimation and field investigation.



AREAS OF EXPERTISE

- ◆ Building and condition facility assessments
- ◆ Project management

EDUCATION

B.S., Civil Engineering, Southern Illinois University/Edwardsville
A.S., General Studies, Kaskaskia College Centralia, Illinois

SIMILAR PROJECT WORK

Atlanta Public Schools (GA) | Educational Suitability Assessments
Aurora Public Schools (CO) | Strategic Plan
Ferguson-Florissant School District, MO | Facilities Master Plan
Fresno Unified School District (CA) | Facilities Assessment Update
Guilford County Schools (NC) | Facilities Master Plan
Gwinnett County Schools (GA) | SPLOST Audit
Hamilton County Schools (TN) | Facilities Master Plan and Projections
Henry County Schools (GA) | Utilization Study
Jefferson Parish School System (LA) | Capital Improvement Plan
Kansas City Public Schools (MO) | Master Planning Services

RELEVANT PROFESSIONAL EXPERIENCE

Parkway North High School, MO | School Master Plan, Project Engineer
Grand Center Arts Academy, MO | Stormwater Runoff Assessment, Project Engineer
Missouri University of Science and Technology Resident Hall, MO | Stormwater Control and Construction, Project Engineer

PROFESSIONAL LICENSES, CERTIFICATIONS, AND ACCREDITATION

American Society of Professional Engineers (ASCE)
National Society of Professional Engineers (NSPE)

Lindbergh Schools (MO) | Strategic Plan
McAllen Independent School District (TX) | Comprehensive Audit of McAllen ISD Facilities Maintenance and Operations
Metro Nashville Public Schools (TN) | Facilities Master Plan Update
Milwaukee Public Schools (WI) | Facilities Master Plan
North Bend School District (OR) | Facilities Assessment
Office of Program Policy Analysis and Government Accountability – Broward, Collier, Okaloosa, and St. Lucie counties (FL) | Performance Audit
Pasco School District (WA) | Facility Master Plan Facilitation - Phase I&II
Portland Public Schools (OR) | Educational Suitability Assessment
Springfield R-12 Public Schools (MO) | Facilities Master Plan
Wentzville School District (MO) | Enrollment Projections.

St. Louise Riverfront Stadium, MO | Football Stadium Design, Project Engineer
Fulton State Hospital, MO | Earthwork Assessment, Project Engineer



LARA OPHEIM

Consultant

MGT CONSULTING GROUP



Ms. Opheim has over 10 years of experience working with data and boundary systems. Her understanding of how demographic and planning data come together to inform groups and individuals to allow for understanding and decision making is critical throughout this project. Ms. Opheim is currently playing a major role on a strategic planning project MGT is conducting for a public housing authority. Ms. Opheim utilizes a number of mapping resources to communicate data effectively in the form of maps, diagrams and 3-dimensional visualizations. Using her technical abilities, she is able to clearly communicate a broad range of information with data-driven maps and will provide data representation modeling through the ArcView Geographical Information System (GIS) to provide a visual and spatial analysis of the representative depictions and models.

AREAS OF EXPERTISE

- ◆ Software-SQL Server Management Studio 2012, PGAdmin, QGIS, Piktochart, ArcGIS, Microsoft Office Suite 2013, SPSS/PASW
- ◆ Statistics, Adobe InDesign, AutoCAD, Microsoft Visio, Inkscape
- ◆ Languages- SQL, PostgreSQL, Python

EDUCATION

M.A. Urban and Regional Planning, University of Florida, 2012
 B.A., Geography & Sociology, University of Florida, 2010

AWARDS, ACTIVITIES, & ACCOMPLISHMENTS

Awarded the 2012 WRS Infrastructure & Environment, Inc. Award in Memoriam of Mario Ripol
 Florida Bright Futures Academic Scholarship (2006-2010)

RELEVANT PROJECTS

Anne Arundel Economic Development Corporation (MD) | Enrollment Projections
 Aurora Public Schools (CO) | Strategic Planning
 Edina Public Schools (MN) | Strategic Planning
 Ferguson-Florissant School District (MO) | Facilities Master Plan
 Guilford County Schools (NC) | Facility Optimization Plan
 Hickman Mills School District (MO) | Facilities Master Plan
 Indiana Department of Administration | Gary School Corporation Emergency Management Services

Lindbergh Schools (MO) | Strategic Planning
 Lyon County School District (NV) | Benchmark Studies
 Metro Nashville Public Schools (TN) | Enrollment Projections
 Pasco School District (WA) | Facility Master Plan Facilitation - Phase II
 Portland Public Schools (OR) | Facilities Master Planning
 Wentzville School District (MO) | Enrollment Projections

WORK EXPERIENCE**MGT Consulting Group, February 2018-Present****Research and Reporting Analyst, Denver Public Schools, Denver, CO | October 2014-January 2018**

- Translated raw data to valuable information to inform decision making across the organization.
- Maintained databases in SQL and PostgreSQL as a portion of the enterprise system.
- Authored the 2020 Capacity Plan, identifying \$142 million in future capacity needs to be funded by the 2016 bond.
- Verified multiple data points during the School of Choice student assignment process through the use of SQL queries.

GIS Specialist, Enserca Engineering, Lakewood, CO | May 2014-October 2014

- Created internal data management plan.
- Published web maps and feature services for web viewers.
- Developed Python scripts to generate inventories of databases.

GIS Intern, Otak, Denver, CO | October 2013-May 2014

- Compiled Visual Resource Inventory (VRI) databases according to Federal BLM standards.
- Created visuals for VRI reports.
- Used Python scripting to create FGDC compliant metadata for project databases.
- Provided project support for the completion of VRI reports delivered to the BLM.

Analyst, GeoPlan Center, University of Florida, Gainesville, FL | January 2011-May 2014

- Processed large datasets for distribution through the use of Python scripting.
- Maintained socio-cultural GIS datasets for use in Florida's Transportation Efficient Decision Making Tool.



LYNDA FENDER

Senior Analyst, Education Solutions Group
MGT CONSULTING GROUP



Ms. Fender is a senior analyst in MGT's Educational Solutions Group. Since joining the firm in 2000, Ms. Fender has served on master planning and facility assessment projects for both PK-12 and higher education institutions. Her extensive facilities experience includes analysis of demographics, educational suitability, utilization, financial feasibility, program needs, site determination, and cost estimation as well as using GIS to analyze boundary redistricting and other demographic analyses. Her work has assisted numerous clients in capital budget development, facility needs prioritization, and customization of space standards and planning guidelines. Ms. Fender possesses strong quantitative skills and broad research experience.



AREAS OF EXPERTISE

- ◆ Data analysis, Enrollment Projections, Capacity and Space Utilization and reporting.
- ◆ Management of facility and educational adequacy assessments, and demographic studies

EDUCATION

B.S., Wildlife Management, Humboldt State University, 1998

SIMILAR PROJECT WORK

Anne Arundel County Public Schools (MD) | Strategic Facilities Utilization Plan & Update

Andover Public Schools (MA) | Comprehensive Facility Master Plan

Atlanta Public Schools (GA) | Facilities Master Plan Needs Assessment & Update. *Concurrent

Boston Public Schools (MA) | Ten-Year Facility Master Plan.

Carroll County Public Schools (MD) | Facility Utilization Study

DeKalb County Schools (GA) | Facilities Master Plan and Update

Eugene School District 4J (OR) | Master Plan Update & Facilities Assessment

Ferguson-Florissant School District (MO) | Facilities Master Plan

Guilford County Schools (NC) | Facility Optimization Plan

Hamilton School District (TN) | Facilities Master Plan.

Henry County Schools (GA) | Utilization Study

Hickman Mills School District (OR) | Facilities Master Plan

Houston Independent School District (TX) | Facilities Assessment

Jefferson Parish Public School System (LA) | Capital Improvement Plan and Bond

Kansas City Public Schools (MO) | Master Planning Services

Laramie County School District1 (WY) | Facilities Master Plan

Lindbergh Public Schools (MO) | Demographic Study

Lyon County School District (NV) | Facilities Master Planning Services & Update

Mesa Public Schools (AZ) | Educational Assessments.

Metro Nashville Public Schools (TN) | Facilities Master Plan & Update

Millington Municipal Schools (TN) Campus Master Plan

Milwaukee Public Schools (WI) | Facilities Master Plan

Montgomery County Public Schools (MD) | Enrollment Projections

North Bend School District (OR) | Facilities Assessment.

North Carolina General Assembly (NC) | School Construction Needs

McAllen Independent School District (TX) | Comprehensive Audit of McAllen ISD Facilities Maintenance and Operations

Pasco School District (WA) | Facility Master Plan Facilitation - Phase I & II

Portland Public Schools (OR) | Educational Adequacy Assessment.

Rapid City Area Schools (SD) | Facilities Study & Update.

Springfield R-12 Public Schools (MO) | Facilities Master Plan

Savannah-Chatham County Public School System (GA) | Educational Suitability Assessment

Spring Independent School District (TX) | Facilities Assessment

Sweetwater Union High School District (CA) | Facilities Master Plan

Wentzville School District (MO) | Enrollment Projections.

Wichita Falls Independent School District (TX) | District-Wide Site and Facilities Assessment

REBECCA POLUM AFSHAR, LEED AP



Senior Consultant

MGT CONSULTING GROUP

Ms. Afshar has been engaged with the discipline of architecture and planning for over 20 years as either a Campus Planner/Architect or College Educator. She is inspired and motivated to develop environments that strengthen the human experience and support a sustainable environment. Most recent in her career has been inspired by the higher education environment. She has found that through space and place an academic experience is strengthened therefore developing a wholistic academic experience.



Envisioning these environments is conducted with thorough research of the built environments and academic utilization. Then generating practical guides in facility and site assessment that support meaningful discussion with the campus leadership and constituents to develop comprehensive master plans that supports a school's mission through its built environment. Ms. Afshar is most excited about building vibrant learning environments, providing opportunities for fostering communities and connectedness, which all stems from her passion for student success and engagement.

EDUCATION

Master's, Urban Planning, University of Wisconsin Milwaukee

Bachelor's, Architecture, University of Wisconsin Milwaukee

LEED AP, 2009-Present

PROFESSIONAL AFFILIATIONS

American Institute of Architects

American Planning Association

U.S. Green Building Counsel

Oregon Department of Education Technical Assistance Program-Certified Assessor

PROJECT EXPERIENCE*Relevant campus master plans (Credo)*

- McMurry University (TX)
- Anderson University (IN)
- Martin Luther College (MN)
- Anderson University (SC)
- Edgewood College, Madison (WI)
- Northeast Wisconsin Technical College (WI)
- Palm Beach Atlantic University (FL)
- Avila University (KS)

Resident Hall Project Coordination (Credo)

- Impact 360
- Morningside College
- Wartburg College

PK12 planning projects (MGT)

- Atlanta Public Schools (APS) | Facilities Assessment
- Hamilton County Schools (TN) | Facilities Master Plan
- Office of Program Policy Analysis and Government Accountability (FL) – Broward, Collier, Okaloosa, and St. Lucie counties | Performance Audit
- Portland Public Schools (OR) | Educational Suitability Assessment
- Research Corporation of Hawaii | Early Childhood Needs Assessment

WORK EXPERIENCE**MGT Consulting Group, Senior Consultant, July 2018-Present**

- Manages the development of PK-12 school district master plans, including facilities condition assessment, community input strategies, development of inventories, capacity and utilization analysis, program analysis, demographic analysis and projections including GIS mapping, and development of reports and recommendations.
- Manages reviews of the facilities and other support functions in K-12 school districts.
- Develops clear, objective, well documented reports and recommendations.

Credo, Campus Planner and Project Coordinator, 2014-2018

- Worked actively with campuses to develop campus master plans, which included a comprehensive review process, collaboration of all campus team members; advanced design development through collaboration of the whole team; master plan development that includes a strategic phasing plan with costs and itemized projects, which resulted in design that demonstrates the campus' mission and vision.
- Member of architectural team who delivered architectural design and documentation for a variety of education environments including student housing, academic, learning resource centers, site work, and student unions.
- Projects vary between new and renovation with project budgets ranging up to 26 million
- Actively work with owners, consultants, and legislative bodies to ensure effective projects with a variety of scopes.

REBECCA POLUM AFSHAR, LEED AP

Senior Consultant

MGT CONSULTING GROUP



- Team member to ensure drafting technology and standards are effective for the office environment.

Waterstone Group, 2013-2014**Schneider National, Inc.**

- Reported to the Director of Corporate Facility Operations.
- Coordinated construction projects nationwide for operations.
- Project permitting, construction coordination and development of varied logistic support office buildings within communities such as Mississauga, Canada; Kearny, New Jersey (with property below flood plain); Fort Worth, Texas; and Indianapolis, Indiana.
- Updated design of security at multiple sites.

Northeast Wisconsin Technical College

- Reported to the Capital Projects Manager.
- Acting construction coordinator to successfully implement three months of immediate need or fast-track construction projects.
- \$2m dollar building renovation, including coordination bid documents/implementation; construction phasing; coordination a three department personnel move; design work for all interior finishes/furniture; owner's representative during construction project maintaining budget; and accommodating occupant's space needs.

ITT-Technical Institute, Drafting and Design Department Chair/Instructor, 2003-2013

- Actively worked to develop student success, engaging environment and highly successful employment rate.
- Gained mastery of presentation skills and understanding of aspects associated with development including architecture and civil engineering.
- Highlight included the development of curriculum on Civil Engineering with topics on land division, infrastructure development, and environmental land issues.

Independent Specialists, Planner, 2001-2003

- Staff representative as a consultant to multiple communities in southeast Wisconsin reviewing and presenting applications on zoning, platting, and land use.

City of Waukesha, Wisconsin, Planner I, 1997-1998

- City staff representative reviewing various applications such as zoning, platting, and land use with presentations to the Plan Commission. Responsible for any antennae site application.
- Additional board responsibilities included the board of zoning appeals, sign review board, and sign appeals board.
- GIS representative of Planning Department.

Gearon and Company (American Tower), Zoning Specialist, 1995-1997

- Coordinated efforts with engineers, land acquisition, and local communities to ensure the implementation of the Sprint PCS infrastructure.
- Worked with communities to obtain permits for PCS sites, which included presenting, research, permit process, and coordination of material required for permits.
- Developed drawings to aid the community's understanding of the nature of the different sites.



APPENDIX C – SUBMISSION ADJUSTMENT

Lani Colley

From: Steve Shelton <steve.shelton@raytownschools.org>
Sent: Friday, March 20, 2020 4:17 PM
To: Lani Colley
Subject: Re: RFP Demographic & Enrollment Study

Follow Up Flag: Follow up
Flag Status: Completed

Yes.

Thank you.

On Fri, Mar 20, 2020 at 2:00 PM Lani Colley <LColley@mgtconsulting.com> wrote:

Dear Dr. Shelton,

In light of the ever-changing conditions due to the COVID-19 pandemic and its affect on city, district, and shipper availability, would Raytown C2 School District consider receiving responses electronically on or before the due date in lieu of physical copies?

Thank you in advance for your consideration.

--Lani

Lani Colley

Manager | Education Solutions Group

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