

## Buncombe County

RFP: School Consolidation Feasibility Study

January 18, 2024



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Charlotte, NC 28202  
(704) 438-9929  
PrismaticServices.com



January 18, 2024

Mr. Ron Venturella  
Procurement Manager  
Buncombe County  
Sent via email [Ron.Venturella@BuncombeCounty.org](mailto:Ron.Venturella@BuncombeCounty.org)

Dear Mr. Venturalla,

Prismatic Services, Inc. is pleased to submit our proposal to Buncombe County to complete the requested consolidation project. We look forward to engaging with local leadership and the constituents of each school district to complete a comprehensive study and develop recommendations that will provide the county, the districts, and the NC legislature with answer as to whether consolidation represents the best possible future. In addition to our passion and deep interest in this work, we believe we are best suited to meet your needs for these reasons:

- ◆ **Depth in the Firm** – Prismatic exclusively serves PreK-12 entities, usually school districts or state agencies charged with assessing school districts. In the past 17 years we have completed more than 300 projects for clients in 31 states and the District of Columbia. We are proud that many of our clients are repeat customers. For example, the Oklahoma Office of Educational Quality and Accountability contracts with us annually for various district performance reviews. We have experience in assessing options for school closures and district reorganizations.
- ◆ **Depth in the Team** – I have been consulting in the PreK-12 space since 1995. Our proposed team of 11 education consulting professionals brings many decades of experience in administering, researching, assessing, coalition building, and implementing audits/feasibility studies in a variety of PreK-12 environments. Our team has “been there, done that” in large and small districts as former teachers, principals, administrators, and superintendents. Our team has strong hard skills in quantitative statistical analysis and strong soft skills in qualitative data collection through interviews, focus groups, and community meetings.
- ◆ **North Carolina Experience** – We are headquartered in Charlotte. Our team on this project includes 5 consultants with experience working in NC school districts in roles that range from teacher and principal to CFO and superintendent. Two of those have experience working in a city school district (Hickory City), which operates independently of the county school district (Catawba). One of those is now a UNCC professor who recently co-authored a book chapter about the school funding mechanism in NC. Two other team members have experience consulting for multiple NC school districts.
- ◆ **Personalized Service** - Having previously worked for some of the largest PreK-12 consulting firms in the nation, we created Prismatic to remain comparatively small. Good consulting work requires really getting to know each client. As a result, we take on comparatively fewer clients

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per year. We believe you will not find another firm that works as hard as we do to help our client programs be as successful as possible. Time and again, clients tell us, after working with only mildly interested university professors or with firms without hardcore quantitative skills, that we bring to the table exactly what they need to help them and their programs be successful.

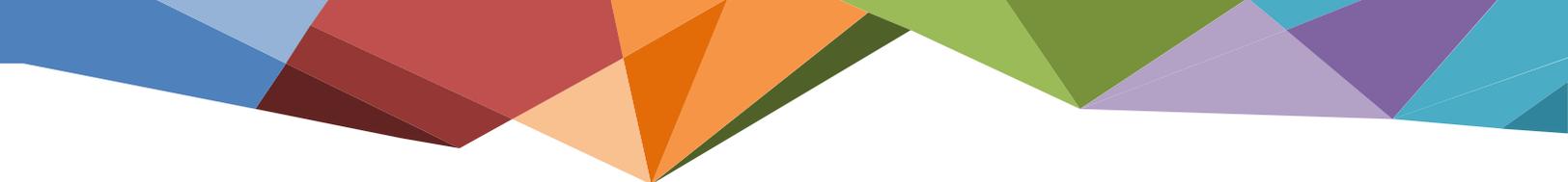
- ◆ **Low Overhead** – Prismatic keeps overhead to a minimum by fully utilizing today’s technologies and eschewing fluff. This is a key differentiator. We are not housed within a university or large consulting firm, which means lower overhead. Although they do not advertise it, many universities charge overhead of as much as 40 percent on evaluations such as this. Other consulting firms charge overhead of as much as 50 percent. We keep our overhead below 10 percent, so you get more actual consulting work for every dollar you spend.

If you have any questions, please do not hesitate to reach out. My email address is [Tatia@PrismaticServices.com](mailto:Tatia@PrismaticServices.com) and my phone number is 704.438.9929. I look forward to hearing from you.

Sincerely,

A handwritten signature in blue ink, appearing to read "Tatia Prieto", with a stylized flourish above the name.

Tatia Prieto, Ed.D., MBA, PMP  
President



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# Proposed Approach

## Scope of Work

Prismatic can provide the expert services you seek in this School District Consolidation Study and meet all RFP requirements, to include:

- ◆ Boots on the ground - a highly skilled, experienced, and diverse team of K-12 professionals who will provide a substantial number of hours onsite, interviewing school district and community leaders, as well as completing key operational observations.
- ◆ Project management – our team will be led by a certified PMP, to help ensure effective project planning, project monitoring, and reporting.
- ◆ Communications – regular written and verbal communication with the Buncombe project point of contact and the county’s strategic partnerships director, as well as leadership of the 2 school districts, and various constituents.
- ◆ Community input – Prismatic places a premium on ensuring that constituents are heard; on this project that will include interviews, focus groups, surveys, and community meetings.
- ◆ Rigorous analysis – this will begin with a general literature review on the topic of district consolidation, followed by a review of the historical discussions of consolidation in Buncombe County, and end with an equity-centered analysis of the possibilities given the current state of each school district.
- ◆ Reporting – a final report detailing all areas analyzed, constituents involved, and a recommended path forward given the risks/benefits of consolidation.

We understand that this is the first time that the state legislature has sought external assistance in wrestling with the question of whether the Asheville and Buncombe school districts should be consolidated, although there has been substantial analysis of the possibility since 1963. Prismatic has assisted numerous districts and agencies with questions of similar strategic gravity and will remember the most important constituents in this work – the students of today and tomorrow.

## Tools for Successful Projects

At Prismatic, our breadth of expertise and experience in all phases of PreK-12 education give us a unique advantage. Our pledge is to help our education partners achieve and maintain effectiveness, efficiency, and accountability. We can make that commitment because we have a consistent and uninterrupted 15-year track record of fulfillment, driving success for school systems from small to large, from rural to urban. And because PreK-12 challenges are multifaceted, we bring many tools to our work, not just one or two. These tools include:

<b>Best Practices in Project Management</b>	Without strong management, projects tend to lose steam and fall behind schedule. We avoid this by ensuring every project adheres to project management principles and best practices structure.
<b>Online Community Meeting Tools</b>	We use up-to-the-minute technologies to provide constituents who cannot make it to an in-person focus group or community meeting the same type of opportunities to participate online. This includes conducting focus groups using Zoom and hosting collaborative online discussions. If the client already uses a



	similar type of technology with staff, parents, students, or community members, we have the tech experts available to launch our work within that platform, so that constituents can use a tool with which they are already familiar.
<b>Statistical Analysis</b>	Our staff has completed advanced coursework in multivariate analysis and structural equation modeling. We have the statistical know-how.
<b>Video/ Teleconferencing</b>	To help keep costs down, we employ virtual conferencing whenever clients are comfortable with the technology.
<b>Online File Sharing</b>	To facilitate sharing among our consultants and with clients, we maintain a secure cloud server for file sharing and work paper cataloging.
<b>Effective Survey Development</b>	Our decades of experience enable us to quickly design survey questions that get to the heart of the matter at hand.
<b>Web-based Surveying</b>	We have a secure, online, customizable system for fielding surveys in a format that encourages those in the target population to respond.
<b>Process Mapping and Improvement</b>	We develop process maps to evaluate the efficiency of various ‘as is’ processes and to identify areas where improvement is possible.
<b>Qualitative Data Collection</b>	In addition to an abundance of quantitative data, we typically gather qualitative information through constituent input opportunities, including focus groups, interviews, community meetings, and fieldwork observations. For interviews, we use a semi-structured interview format to allow a free flow of ideas and an open atmosphere of conversation. This often reveals novel points of interest that the team did not originally set out to understand, and it provides a forum for constituents to voice their concerns and questions. For community meetings, we typically get the best input using guided prompts. For fieldwork observations, we use pre-developed rubrics that specifically guide onsite data collection.
<b>Standardized Interview Guides</b>	Consistent, high-quality data collection in the field is critical. Our consultants understand that client time is valuable. For that reason, our consultants develop their interview questions before going onsite. This helps ensure that no important question is forgotten and that all project objectives are fully met.
<b>Knowledge of Best Practices and Standards in School District Operations</b>	Industry standards and recognized best practices exist for many school district operational areas. We maintain a library of industry standards and best practices, as well as monitor best practices databases of numerous associations and education organizations. Maintained electronically on a cloud server and indexed by topic area, Prismatic consultants reference the library during every project. Thus, our clients not only receive the benefit of the consulting hours our consultants provide specific to the project, but also the countless hours that we have already spent in identifying and reviewing best practices from every corner of the PreK-12 education sector.
<b>Benchmarking Skills</b>	Benchmarking is not simply a comparison of numbers or performance statistics. Numbers are helpful for identifying performance gaps, but true process benchmarking identifies the “hows” and “whys” for those gaps and helps organizations learn how to perform at higher levels.

Although we may not use all these tools on every project, we have them available if needed.

All Prismatic projects incorporate four pillars:

<b>Standards</b>	Our firm is guided by best practices in project management.
<b>Leading Edge Tools</b>	We leverage technology, solid research, and effective teamwork to meet the needs of our clients. We bring an extensive tool kit to each project.
<b>Personalized Service</b>	Having previously worked for some of the largest PreK-12 consulting firms in the nation, we created Prismatic to remain comparatively small. Good consulting requires really getting to know each client.
<b>Low Overhead</b>	Prismatic keeps overhead to a minimum by fully utilizing today's technologies.

### Project Management

**Management can make or break a project.** In one survey more than two-thirds of US Federal government managers said that only one in five of their projects finishes within budget and on time.<sup>1</sup>



Only 1 in 5 projects finish on time  
and on budget

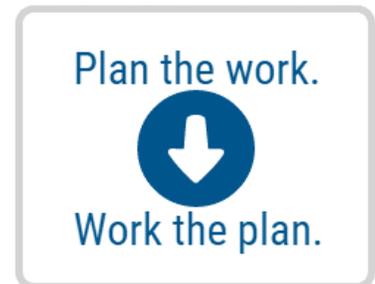
Often projects fail to meet all their objectives, suffer from scope creep, or exceed their budgets. Those projects that do succeed share some common characteristics, including effective project management.

Effective project management requires the efficient use of

knowledge, skills, tools, and techniques to accomplish objectives. Our team is well-versed and seasoned in project management, bringing to the table experience in successfully managing a variety of PreK-12 consulting and projects.

Our proposed project manager for this engagement is a Project Management Professional, certified through the Project Management Institute (PMI), an international body. We understand and utilize the project management processes and standards supported by PMI. This includes adherence to the Code of Ethics and Professional Standards required by PMI. Prismatic is committed to doing what is right and honorable and requires responsibility, respect, fairness, and honesty (PMI's four foundational values) of all its team members.

From the beginning of our work together, we will emphasize meeting all of your requirements. In our first meeting, we plan to review in detail our proposed project work approach to determine its degree of fit with your expectations. If the fit is not perfect, we will adjust our work approach accordingly. Once we have planned the work to our full and mutual satisfaction, we will rigorously work the plan.



<sup>1</sup> PM Network magazine, March 2008.

## Project Plan

Listening can be hard. It’s not the same as merely hearing. It’s deeper than writing down and summarizing what was said. For this project, “listening” will require understanding what was said as well as what was not said, contextualizing both, then organizing all the input of constituents, combining it with expert analysis, and providing actionable recommendations to Buncombe County.

With that in mind, Prismatic’s project plan includes **8 tasks, each with built-in flexibility** to meet your specific needs. In the plan, we include as our first step in working with you a full review of our project approach and modification, if necessary, to meet project needs.

### TASK 1 - Initiate Project



We will begin this project with an onsite visit with Buncombe County and school district leadership and staff for the purpose of discussing and finalizing our proposed team, work approach, deliverables, and timeline, as well as handling contractual details. During the project initiation teleconference, we will discuss:

- ◆ overall correspondence between Prismatic’s proposed approach and goals of Buncombe County
- ◆ initial perceptions regarding prospects for or challenges regarding consolidation
- ◆ methods of data transfer
- ◆ project meeting dates and schedule
- ◆ draft data collection list
- ◆ other areas desired by Buncombe County

We recognize that the question of consolidation has been broached in the county since at least 1963. As part of this task, we will want to discuss with county and school district leadership their thoughts on those past efforts, why they were launched when they did, and why they came to the conclusions they did. When the reports recommended consolidation, we will want to discuss why that did not happen at that time. There are also several reports in the research literature that speak to pros, cons and considerations for consolidation.

Year	Report	Conclusions
1963	Buncombe County Citizens Committee for Better Schools, Subcommittee on School Consolidation Study	Recommended consolidation of Asheville City and Buncombe County Schools. Suggested further study and consideration by local school authorities.
1967	Blue Ribbon Asheville-Buncombe County School Study Committee	Recommended immediate merger of Asheville and Buncombe Schools. Emphasized the need for a strong financial base to ensure additional educational opportunities for all students.
1976	Local Study Committee Report Fragment by an unspecified “Commission”	Recommended merging Asheville and Buncombe into a single countywide school system. Advocated for a uniform countywide tax to support the school system.

Year	Report	Conclusions
1977	Report to City Board of Education Advisory on Consolidation by F. Jack Cole	Reviewed excerpts from local and statewide studies on consolidation. Did not provide an explicit conclusion but emphasized the responsibility of providing for children's education.
1978	Asheville-Buncombe County Joint Consolidation, Fact-Finding Study Commission	Weighed pros and cons, determined that a merger was not necessarily required to correct inadequacies in the county. Highlighted alternatives, emphasizing that consolidation should enhance educational opportunities rather than just save costs.
1982	"Considering School Consolidation in Asheville and Buncombe County" Report	Recommended against consolidation due to potential tax increase, lack of evidence for savings or educational improvement, and overwhelming public opposition. Highlighted existing cooperative efforts between the systems.
1986	Report to Leadership Asheville on Consolidation of Schools by an unspecified author	Reviewed previous studies and discussed opportunities and challenges associated with consolidation.
1996	"The Urge to Merge: Issues and Implications" Report by the Asheville-Buncombe League of Women Voters subcommittee	Urged a more detailed study for consolidation, including thorough financial analysis. Emphasized the need to explore additional areas of collaboration.
Undated	"Central Issues Related to Asheville City/Buncombe County School Merger"	Addressed various questions associated with the merger, provided examples of existing cooperation, but no explicit conclusions drawn.
Undated	"Consolidation: A Review of the Studies for the Asheville/Buncombe County School Systems"	Explained ways consolidation can occur, reviewed past studies, and described alternatives. Hesitated to recommend for or against consolidation but advised authorities to be cautious, as merger may not solve intended problems.

Also as part of project initiation, we will provide county and school district leaders an initial data request list. Items will be included on the list to help our team understand the current situation of each district. We will want to begin to answer such questions as:

- ◆ Are policies and procedures of Asheville City and Buncombe County Schools largely the same or substantially different? Staffing plans? Salary schedules? Are the operational areas? Facilities?
- ◆ What is the current financial health of all entities involved?
- ◆ How do measures of student academic achievement and wellbeing vary across the districts, given the variance in base student demographics?
- ◆ How has each district tackled inequities? Is 1 having more success at reducing inequities than the other?
- ◆ Besides the current Asheville City Schools enrollment/capacity study and recent compensation/classification studies, what other ongoing work could be leveraged to provide information for this project?

Finally, Prismatic knows that projects are made better through regular, sustained communications with the client. We typically propose to schedule at least **monthly “check-in” calls** via Zoom/videoconference or phone, with weekly calls scheduled during periods of intensive project activity. We typically set these for the same day of week and time for the life of the project to help establish a systematic communication flow. These check-ins would have a set agenda so they can be completed efficiently. This agenda is usually:

- ◆ discussion of activities completed in the previous period
- ◆ review of challenges or changes in project progress since the last call
- ◆ review of activities scheduled to occur in the upcoming period
- ◆ review of upcoming project products and their deadlines

The check-ins would be attended by the Prismatic project manager, at least one project support staff member, and one or more project consultants as needed, depending on the current activities and deliverables. Of course, Prismatic consultants are always available via email throughout the month between check-ins. Prismatic’s project manager will be regularly accessible via phone 6 days a week. Our goal in this task is to get the project off to a fast and productive start.

#### Key Deliverables of Task 1:

- Contractual Arrangements
- Revised Project Team, as necessary
- Revised Work Approach, as necessary
- Revised Project Timeline, as necessary
- Collection of additional historical studies, if any
- Discussion of local leader impressions regarding historical studies
- Initial collection of key leadership opinions regarding consolidation
- Initial collection of background data for each district

#### TASK 2 – Assess Current Operations

The onsite work of the team is the heart of the entire listening process and particularly important on a feasibility study like this. Done well, the team will leave with a deep understanding of the challenges each school district and the community face, as well as solid ideas for what might be the best option moving forward. As shown in Chapter 2 of this proposal, we have staffed our team with experts in all the areas requested in Section 5.0 of the RFP.



**We know this project will require substantial boots on-the-ground work.** Onsite, we will engage in these activities:

- ◆ **Interview Leaders** – We will interview key school district and community leaders. Our 3 fiscal experts will interview financial leaders to fully understand the underlying current and likely future financial conditions of all the public entities would be impacted by consolidation. Our education consultants will talk with district leaders to understand each local education landscape. Other consultants will talk with their district counterparts to understand the similarities and differences between the 2 school districts. Our project manager will meet with leaders to hear their concerns and ideas.

- ◆ **Observe Operations** – Our food services and transportation experts will observe a sample of operations to better understand and verify the operational data collected in Task 1, as well as to assess equity across the districts in these areas. Our facilities expert will visit a sample of schools in each district to do the same.
- ◆ **Hold Focus Groups** – Our consultants will hold a number of focus groups with samples of principals, teachers, and classified staff. The number will vary by operational area. To ensure the widest possible listening work, we propose an iterative process here, leaving open the possibility for additional focus groups with various constituents as the project progresses. This will allow for deeper exploration as insights are developed as well as provide for any necessary course corrections.

As an added method for soliciting operational input, we will plan to host a number of the interviews and focus groups online.

We propose to complete Task 2 activities in several phases. Some will be scheduled for April/May (primarily leadership interviews). Those that can be effectively scheduled when schools are out, such as the review of facilities, will be completed over the summer. Others will be scheduled for early Fall '24 when schools resume.

A successful onsite period is typically packed with a full schedule of interviews, focus groups, school walkthroughs, activity observations, and team meetings. To make that happen, Prismatic requires all team members to review the data already collected in their areas, review the project work plan, and participate in 1+ internal zoom meetings to ensure understanding and address any questions.

Also prior to the onsite work of the full team, the Prismatic project manager will have worked with county and district administrators to develop initial interview and focus group schedules for each team member.

Thus, each team member will step into Buncombe County well prepared and able to maximize the use of the onsite time. For each review area, team members will follow the same general process:

- ◆ review data collected in the previous task
- ◆ review and discuss the potential preliminary issues already identified
- ◆ develop interview, focus group, and onsite research guides customized to the team member's initial impressions of the district data
- ◆ attend Prismatic team meetings to discuss potential thematic issues or areas of special concern
- ◆ conduct initial interviews from a predetermined schedule developed by the project manager
- ◆ conduct initial focus groups, where appropriate, from a predetermined schedule
- ◆ tour district facilities, such as bus garages and classrooms
- ◆ observe district activities, such as lunch being served to students
- ◆ request and review additional data in areas that may lead to a finding
- ◆ make arrangements to conduct follow-up and additional interviews with district staff

- ◆ compare district data to peer district data
- ◆ compare findings to best practices, benchmarks, and standards
- ◆ complete analyses and research
- ◆ develop a list of preliminary issues, focusing on potential gains or challenges from consolidation for their operational area

#### Key Deliverables of Task 2:

- Customized interview and focus group guides
- Successful onsite visit and online activities
- Initial analyses by area (financial, operational, facilities, etc.)
- Preliminary issues by area

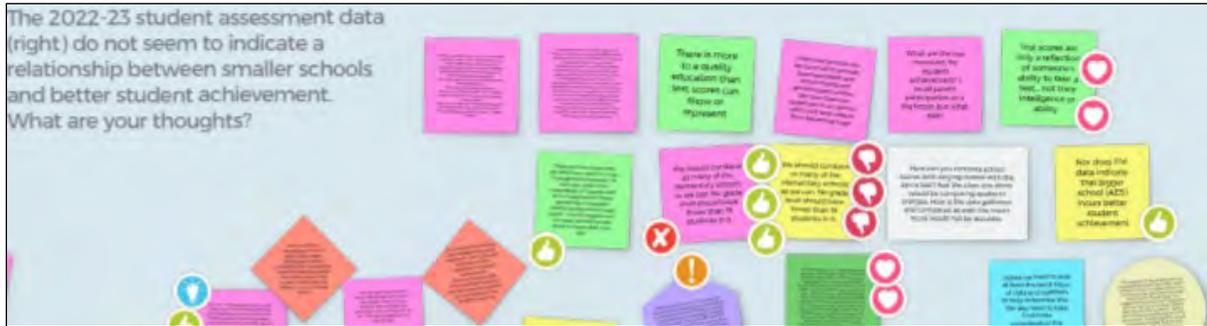
### TASK 3 – Develop Strategic Communications and Engagement Plan

We look forward to developing a strategic communication and engagement plan with CAPE to inform and engage the public about the study. We propose 4 methods for accomplishing this work:



- ◆ **Constituent Surveys** - We use surveys in almost every project we undertake, as they often provide a wealth of opinion and information not available through any other method. For this project, we propose both the typical, initial survey to collect a wide variety of opinions but then also a follow-up survey to solicit additional input once we are nearing the end of the project, in order to fully explore emerging options and test themes that may better engage communities in support of each option. The initial surveys would include customized instruments for students, parents, school staff groups, and the general public. The follow-up survey audiences would be decided as the project progress.
- ◆ **Focus Groups** – We propose to hold 5-10 focus groups with members of advocacy groups, civic organizations, businesses, and churches. We will want to document their concerns about consolidation (or no consolidation) as well as ideas for improvements, whether consolidation is recommended or not. We would ask each group to determine whether an in-person or online focus group would be best for their membership.
- ◆ **Community Meetings** – We propose to hold at least 2 community meeting in each of the 5 towns (Biltmore Forest, Black Mountain, Montreat, Weaverville, and Woodfin) within the county and at least 2 in Asheville City. These will be scheduled with the input of county, city, town, and school district leaders, in hopes of gathering a large turnout for each. Community meetings will include several methods of input gathering, perhaps including post-it walls, mock voting stations, and small table discussions.
- ◆ **Online Forum** - We also propose to host, either on our platform or a platform already in use by the county, an online discussion forum that would seek anonymous comments on questions of interest in this project. Later in the project, we would use the same platform to seek feedback on potential consolidation options. We have used a variety of tools for this work, including Ideaflip and Ideawall. Although the tools vary, the online forum allows for a process akin to

thread discussions and virtual post-it note collaboration. In the use of the online discussion forum, we will moderate all discussion threads.



Key Deliverables of Task 3:

- Initial constituent survey instruments
- Survey launch plan and monitoring
- Initial Constituent Survey Results
- Strategic communications and engagement plan

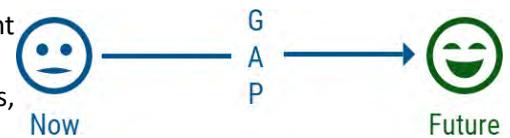
**TASK 4 – Analyze Alternatives**

In this task we will work closely with county leadership to review emerging themes from Tasks 1-3. The operational conclusions we draw will provide the initial outlines for what might be possible regarding consolidation, as well as initial constituent concerns and desires. We emphasize that these are initial results. We believe in a truly collaborative approach with clients. That means that all of our initial conclusions and recommendations will be discussed with you thoroughly prior to development of reports and infographics.



We will develop a SWOT analysis, identifying the Strengths, Weaknesses, Opportunities, and Threats of the consolidation options. It is important to approach this task with sensitivity – we recognize that no organizational structure will be perfect and satisfy everyone.

We will then undertake an analysis of the gaps between the current state and the future state to determine what needs to be done to move toward an improved future state. To accompany this analysis, we will identify risks associated with each potential future state.



With any change, there is risk. Even well-laid plans and solid execution do not guarantee future success. However, a careful assessment of risks associated with each future state scenario should point to key factors for success as well as identify areas in which leaders should attempt to mitigate known risks.

Key Deliverables of Task 4:

- List of Preliminary Issues for potential consolidation options
- SWOT and Gap Analyses

### TASK 5 – Engage Community

In this task we will put into motion the elements of the Strategic Communications and Engagement Plan approved by the county. We will follow the lead of Buncombe County CAPE and can provide tools and staffing to support effective communications and engagement.



Likely Key Deliverables of Task 5:

- Implementation of the Strategic Communications and Engagement Plan
- Follow-up constituent survey instruments
- Survey launch plan and monitoring
- Follow-up Constituent Survey Results
- Customized focus group guides
- Constituent Focus Group Results
- Customized community meeting activities
- Community Meeting Results
- Online discussion forum and moderation
- Online Forum Results

### TASK 6 – Draft Report

This task first comprises an iterative process between the consulting team members and the project manager. During development of the initial draft, most of the work is done by the team members, overseen by the project manager.



This task next comprises an iterative process between the Prismatic project manager and our county point of contact. We have no interest in developing a heavily footnoted, esoteric, academic report that will immediately begin to gather dust on the client's shelves. For this project, the worst possible outcome would be for the NC legislature to be dissatisfied with the strength and quality of the report and but for there to remain lingering questions such that the county and school districts are forced to wrestle with the consolidation discussion again next year or the year after that. We do want to provide Buncombe County with an understandable and actionable report and infographics that will help it and the legislature move confidently towards the future.

Once a draft product is submitted, Prismatic expects that its project manager and the county point of contact will discuss it. As needed, changes to content, format, and tone will be made, until the product meets all client expectations.

Key Deliverables of Task 6:

- First Draft Product
- Review of draft with client

### TASK 7 – Develop Final Report, Summary, and Slide Deck

We understand that final products become seen as Buncombe County products. As such, they should adhere to standards of quality and consistency established by the county. We are committed to following those standards.



In the final main report, we will provide:

- ◆ Description of the research methods used
- ◆ Summary of activities
- ◆ Lines of analysis – financial, educational, facilities, and operational
- ◆ Summary of constituent inputs
- ◆ Findings
- ◆ Risks/Benefits of consolidation
- ◆ Recommended solutions for consolidation, as determined by analyses
- ◆ Consolidation implementation considerations, if needed

We will provide the county with an executive summary and a slide deck based on the final report.

Key Deliverable of Task 7:

- Final Report and Products

### TASK 8 – Provide Presentations

As desired, we will prepare and provide targeted presentations to constituent groups. At a minimum this would include each district’s school board and the County Board of Commissioners. In these presentations, we will highlight the major findings and recommendations of the final report. Our presenter will be prepared to answer questions in detail and to discuss possible avenues for recommendation implementation, if needed.



Key Deliverable of Task 8:

- Project Presentations

## Deliverables

Each Prismatic task has associated interim deliverables, already outlined in our proposed project plan. The final deliverables of this project will be a report that details the journey of the project, the analyses completed, the community voices that were heard, and the final recommendations of the team.

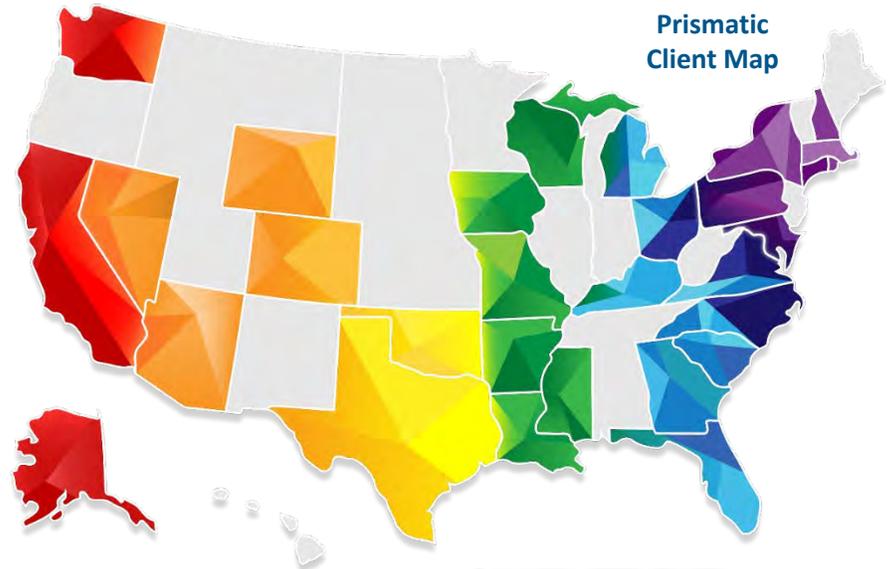
## Project Timeline

With a mandated deadline of February 15, 2025 to report to the NC legislature, Prismatic proposes a timeline that results in the final products no later than December 2024. Our timeline recognizes that some project activities could realistically only take place while school is in session (such as student surveys), some could take place over the summer (such as interviews with town leaders and school facilities condition verification).

<b>Task</b>		<b>Proposed Timeline</b>
1	Initiate Project	April 2024, with data collection to continue as needed throughout the life of the project
2	Assess Current Operations	April through October 2024, with 3 likely major onsite periods
3	Develop Strategic Communications and Engagement Plan	May through July 2024 June 2024 for Initial Constituent Surveys
4	Analyze Alternatives	April through October 2024
5	Engage Community	August through October 2024
6	Draft Report	November 2024
7	Develop Final Report, Summary, and Slide Deck	December 2024
8	Project Presentations	January 2025

# Chapter 2

Since its founding in 2007, Prismatic's focus has been on serving children, typically within the preK-12 education market. Unlike other firms, we do not consult in any other sectors. This has given us an extraordinary depth of understanding of the challenges that agencies face when seeking to improve the lives of children. **To date, we have completed more than 300 projects for clients in 31 states and the District of Columbia.** We are proud that most of our clients are repeat customers and return to us to assist with new problems after we have made recommendations to solve their initial challenges.



Prismatic is a registered **HUB in North Carolina** and nationally certified as a woman-owned business through WBENC.

Headquartered in Charlotte, NC, we have remote consultants based in Virginia, Georgia, and Florida. We have a network of 50+ contract consultants located across the country.

## Prismatic Mission

*Our mission is to support positive change in preK-12 organizations by providing information, insight, and actionable ideas. In all our efforts, we remember the most important customer – students.*

## Prismatic Values

<b>Research-Based</b>	We make recommendations based on research, which includes best practices, industry standards, and peer benchmarking.
<b>Open-Minded</b>	We know one size does not fit all. We embrace the multitude of ways in which a district may choose to successfully educate its students.
<b>Yeah Team!</b>	We succeed as a team, not individuals. Teamwork is key to project success and client satisfaction.
<b>Go Beyond</b>	We go beyond what other firms provide. We give more because we know our work is important in improving students' lives.
<b>Bold</b>	We make <b>bold</b> recommendations. Our clients depend on us for solutions, not support for a failing status quo.
<b>Information</b>	We provide clients with information, not just data. Information is data with insight and analysis.
<b>Versatile</b>	We bring many tools to each project and stand ready to adapt our methodology as the project evolves. Moreover, we are committed to continually evolving, always seeking to improve.

**Prismatic provides services exclusively to schools, school districts, and educational agencies across the country**, focusing on the operational and support programs that make schools and districts successful. Our primary categories of consulting are:

- ◆ Comprehensive Management, Performance, and Efficiency Reviews
- ◆ Operational and Equity Audits
- ◆ strategic planning
- ◆ feasibility studies
- ◆ Federal preK-12 grant evaluations
- ◆ performance audits (to yellow book standards)
- ◆ process improvement studies
- ◆ organizational assessments
- ◆ central office reorganizations
- ◆ administrative and instructional technology reviews
- ◆ financial management reviews
- ◆ human resources reviews
- ◆ food service reviews
- ◆ transportation reviews
- ◆ safety and security reviews (including emergency readiness)
- ◆ facilities and maintenance management reviews

What ties all of these consulting areas together? **Listening to everyone with an interest in the challenge at hand. Listening is the beginning and the end of every project we undertake.**

Examples of how we listen include:

- ◆ **Surveys** – We use surveying on almost every project we undertake. We have both designed surveys to elicit participant input and identified valid and reliable existing survey tools in the research literature that are suitable for the project at hand. We now typically administer surveys via an online, confidential application, but have in the recent past complemented online surveys with hardcopy options for harder-to-reach constituents. We have thus far fielded surveys in English, Spanish, Haitian-Creole, Chinese, Russian, Marshallese, and Korean. In addition to the typical descriptive statistical analyses, we have worked with clients to publish infographics to communicate the most critical results of the survey work.
- ◆ **Focus Groups** – We often employ focus groups as a data collection technique. For them, we typically use a semi-structured format to allow a free flow of ideas and an open atmosphere of conversation. This process better reveals novel points of interest and provides a forum for parties to voice concerns and questions. We have conducted focus groups with elementary, middle, and high school student groups, staff implementers of various programs, parents, school social workers, school principals, local business leaders, community agency heads, etc. We have conducted focus groups both in-person and virtually.
- ◆ **Interviews** – As with focus groups, we typically use a semi-structured format. Our team members have experience in conducting interviews with a wide range of stakeholders. In one 5-year project, we fielded a bi-lingual team to gather highly personal information from the parents of children with mental health challenges every six months. In several other school districts, we conduct mid-year and end-of-year onsite interviews with the leaders and implementers of a variety of educational and student support programs. On a recent project, we conducted

interviews with a multi-disciplinary group of community leaders from afterschool program organizers to county commissioners to university professors to help them determine the strategic direction of their organization. We have conducted interview both in-person and virtually.

As dictated by the needs of the project, we have engaged in classic focus group/interview analyses, including recording, transcription, thematic coding, and contextual grounding.

- ◆ **Community Meetings** – While not always an efficient method of collecting constituent input, community meetings can be an important way of hearing from populations who are not comfortable providing input via more traditional methods. In one recent project, we deployed multiple stations at the community meetings, including a video station for those who wanted to provide verbal input and several other stations that solicited input via game-like methods. We recognize that community meetings can also be an important component of publicizing that every constituent’s input is truly wanted on a project.



- ◆ **Data Parties** – We do not consider data analysis complete until we have collaboratively reviewed it with the client. These discussions often lead to deeper insights and further analysis. We typically develop data placemats that are revealed to the client group at the party and then provide discussion prompts.

We typically use all of these elements in an individual project. For example, in our work with San Francisco Unified School District, the Prismatic team visited 44 schools, completed 75 interviews, completed 9 focus groups, and collected multi-lingual survey data from over 3,000 stakeholders. We then worked with the client to collaboratively analyze the data and develop a report, presentation, and infographics that communicated our findings and recommendations.

At Prismatic, we work hard to develop reports that stakeholders will not have to work hard to understand. We do not believe in sacrificing rigor of analysis, but we also do not believe that the best product of a project is a long, jargon-filled report. Instead, **we believe that the best product is an easily**

understood, succinct, graphic-heavy report that is actually read by interested parties and used by leaders to drive decisions.

## Related Projects and Work Samples

In terms of

- ◆ the research techniques we envision using on this study, nearly all Prismatic projects are related to this one. We use surveys, interviews, and focus groups on nearly every project.
- ◆ the constituent groups we envision listening to on this study, nearly all Prismatic projects are again related to this one. Nearly all of our work involves listening to students, parents, community members, district staff, and local leaders.
- ◆ projects specific to analyses of potential school closures, consolidations, and reorganizations, many Prismatic projects are relevant. Our comprehensive reviews always consider these areas, although we may not ultimately make a recommendation.

Specific related Prismatic work that can be found online:

- ◆ **District Reconfiguration Project** – Prismatic just completed an extensive study of how to best reorganize The ConVal School District in the face of declining enrollment, excess facility capacity, and a 1967 organizational agreement that required any school closures to be put to a public vote. Completed in December 2023, our [ConVal Report](#) analyzed many options for district reconfiguration, weighing multiple factors. Prismatic recommended the consolidation of 8 elementary schools into 4. The ConVal School Board voted to place Prismatic’s recommendation on the March 2024 ballot.
- ◆ **Oklahoma Office of Educational Quality and Accountability (OEQA)** - Prismatic has completed more than 40 school district reviews for OEQA. Each School Performance Review was comprehensive, covering management, human resources, community engagement, instructional service delivery, business operations, facilities, child nutrition, technology, and transportation. Final reports can be found [here](#). The most recently completed reviews were for Lone Wolf Public Schools (~110 students), Crescent Public Schools (~600 students), Mid-Del Public Schools (~11,000 students), and Maryetta Public Schools (~800 students). All of the reviews looked at organizational structures and strategic planning. In the case of Lone Wolf, the team also analyzed options for either consolidating with another district or growing its own enrollment.
- ◆ **Listening Project** – completed this past year for the Children’s Trust of Alachua County (FL), this project included interviews, surveys, focus groups, and community meetings. A copy of the final report can be found [here](#). The Trust serves to support the needs of ~50,000 youth from prenatal to age 18.
- ◆ **Texas Legislative Budget Board (LBB)** – Prismatic has completed several school district performance reviews for the LBB. Most recently, we reviewed the facilities, safety/security, and food services areas of Houston ISD. The final report can be found [here](#). In that review, Prismatic found that Houston ISD had surplus capacity for ~38,000 students. With enrollment projected to decline for the next decade, Prismatic recommended that the district consider closing 39 of its 246 schools.

- ◆ **Virginia School Efficiency Review** program – Prismatic completed reviews of three school districts under this program: Amherst, Bedford, and Fluvanna Public Schools. In Amherst, Prismatic recommended the continuation of one of the district’s small, remote school based on a cost/benefit analysis. In Bedford, Prismatic recommended the closure of two schools. In both cases, the school districts implemented those recommendations. Copies of the final reports can be found [here](#).

## Client References

Prismatic client references are listed below. All projects have been completed **on-time** and **within budget**. Our clients can all attest to our ability to manage consulting engagements and fully satisfy client expectations. Because we provide consulting services in a full range of preK-12 areas, we have included projects that have focused on a variety of education consulting areas including comprehensive performance reviews, efficiency audits, and transportation audits. We believe these projects demonstrate our range of offerings and thorough expertise in providing consultant services to support ConVal on this engagement.

Project	Contact Person
The School Performance Review of Mid-Del included a recommendation to close several elementary schools, which was successfully achieved. Prismatic also recommended creating the <b>district’s first DEI leadership position</b> and establishing processes for an equitable distribution of financial resources.	Dr. Rick Cobb Superintendent <b>Mid-Del Public Schools</b> 7217 SE 15 <sup>th</sup> St, Midwest City, OK 73110 405.737.4461, Ext. 1233 rcobb@mid-del.net
Mr. Edelkind was Prismatic’s primary point of contact on the recently completed <b>Reconfiguration Project</b> for ConVal. Once the school board voted 11-2 to put Prismatic’s recommendation on the March 2024 ballot, Mr. Edelking has led the district’s efforts to garner public support, using analyses and data from Prismatic’s report.	Alan Edelkind School Board Member <b>ConVal School District</b> 106 Hancock Rd, Peterborough, NH 03458 603.562.8182 AEdelkind@conval.edu
Prismatic has completed more than 40 school district <b>performance reviews</b> for the Oklahoma Office of Educational Quality and Accountability. Mr. Kurt has overseen Prismatic’s last 3 reviews for the agency.	David Kurt Manager <b>OK School Performance Review Program</b> 5400 N Grand Blvd, Oklahoma City, OK 73112 405.522.5399 David.Kurt@oeqa.ok.gov
<b>Management and Performance Reviews</b> of Big Spring ISD, Lytle ISD, Brownfield ISD, and Houston ISD. On the Houston ISD review, Prismatic recommended the closure of multiple schools, due to declining enrollment and substantial maintenance needs.	Josh Shepherd Manager, School Performance Review <b>Texas Legislative Budget Board</b> Robert E. Johnson Office Building 1501 N Congress Ave, Austin, TX 78711 512.463.8748 Josh.Shepherd@lbb.tx.gov

Project	Contact Person
<p><b>School Efficiency Reviews</b> of Amherst, Bedford, and Fluvanna County as part of the Virginia Department of Budget and Planning school efficiency review process. These reviews were comprehensive, covering all aspects of each district. On the Bedford review, Prismatic recommended the closure of several schools, which was successfully achieved.</p>	<p>Cari Corr Senior Analyst <b>VA Department of Planning and Budget</b> Patrick Henry Building 1111 East Broad Street, Room 5040 Richmond, VA 23219 804.225.4549 Cari.Corr@dpb.virginia.gov</p>
<p>Prismatic was a subcontractor to Cotton and Company on 2 projects: a statewide review of food services and the operations of the state child nutrition department in Colorado and a performance audit of Pawtucket School Department (RI, 7,800 students). Both projects required extensive onsite work and were completed to <b>Yellow Book</b> standards.</p>	<p>Sam Hadley Partner (former) <b>Cotton &amp; Company LLP</b> 635 Slaters Lane, Alexandria, VA 22314 703.618.4538 shadley@cpmteam.com</p>
<p>Evaluation of the Fort Worth After School Program, which has 79 sites. Annual work includes stakeholder surveys, focus groups, interviews, and program observations. Continuous client since 2016.</p>	<p>Miguel Garcia Director, FWAS <b>Fort Worth Independent School District</b> 100 N University Ave, Fort Worth, TX 76107 817.815.2953 Miguel.Garcia24@fwisd.org</p>
<p>Evaluation of the district’s 3-year Perkins modernization and innovation grant, funded by US DOE. Work included development and fielding of student surveys. Prismatic has completed two other projects for the district and is currently completing the Local Needs Assessment (LNA) required to maintain Perkins grant funding. The LNA includes surveys of students, graduates, teachers, and industry partners. Client since 2018.</p>	<p>Dr. Lupe Diaz Executive Director, CTE <b>Miami-Dade County Public Schools</b> 10151 N. W. 19<sup>th</sup> Ave, Miami, FL 33147 305.693.3030 LupeDiaz@dadeschools.net</p>

## Proposed Project Team

Key differences in the way Prismatic builds a project team include:

- ◆ **We build a team specific to your project.** For example, you won’t find a transportation expert evaluating the food service department because that’s who is available. We staff each portion of a project with an expert in that particular area.
- ◆ **We do not bait and switch.** We do not advertise using senior, experienced professionals and then have someone else do the work. The team members we propose are the people you will actually work with, face-to-face, and via Zoom.
- ◆ **We are flexible.** If, during our project initiation task, our work approach review indicates we need more expertise in a particular area than we originally proposed, we will add to or adjust our team. We do not believe the team is decided upon until after we (Prismatic and the client) completely agree on the scope of work.

- ◆ **We are unbiased.** We have no products to sell. We are not looking for just the right set of data with which to complete a dissertation, or the right project to hand out to graduate students.
- ◆ **We work well together.** Our collegiality means that our clients get the best efforts of a united team, not the scattered attempts of a group of individuals.

Our planned team for this project includes consultants who have experience in serving school districts as leaders for change, understand the landscape of today’s education environment, and can be immediately productive. Prismatic has the necessary clerical and technical support personnel to ensure that all products, including surveys, drafts, and final reports are of professional quality. Why each of these Prismatic consultants was selected for this proposed team is outlined on the following pages.



### Proposed Prismatic Team



Tatia Prieto, MBA, PMP,  
Ed.D.

Dr. Prieto has 25+ years of experience consulting for school districts across the nation. She has worked with districts large and small to address various operational challenges. She recently led Prismatic’s team in the reconfiguration of ConVal (NH). She has led teams that have both recommended the closure of schools (most notably in Houston ISD) as well as the preservation of small rural schools within a district—in all cases, the recommendations were made considering the best interests of students. Prismatic’s work has been used by clients to support the adoption of facilities master plans, bond issues, and new strategic directions.

Dr. Prieto founded Prismatic in 2007. In addition to managing this project, she will be tasked with gathering community input via in-person focus groups and community meetings, then assessing various [community impacts](#).



Stacy Williams, MA Ed,  
MSA, Ed.S., Ed.D.

Dr. Williams is a former teacher, principal, and district administrator from Iredell-Statesville Schools (NC, 21,000 students). She has been both a high school and alternative school principal. In addition to years of successfully working with education professionals to drive programmatic improvements, Dr. Williams has experience in merging schools.

Dr. Williams joined Prismatic in 2022. She has already worked on projects in multiple states, including the recently completed District Reconfiguration for ConVal (NH), the Listening Project in Alachua County (FL) and the Equity Audit of Eureka City Schools (CA). On this project, she will lead analyses related to [student enrollment, educational outcomes, and wellbeing](#).



Shawn Clemons, MA Ed,  
Ed.S., Ed.D.

Dr. Clemons is a former teacher, assistant principal, and district administrator who has served 3 NC districts: Catawba County, Hickory City, and Charlotte Mecklenburg Schools. Thus, she has experience working for both districts in a city-county arrangement similar to that of Asheville-Buncombe as well as for 1 of the largest districts in nation. Her administrative positions have included data use specialist, director of accountability, and interim superintendent.

Dr. Clemons is currently a Prismatic consultant on a multi-year evaluation of the PreK Priority Initiative of Smart Start of Forsyth County (NC). On this project, she will lead analyses related to [instructional and programmatic offerings](#).





Walter Hart, M.Ed., Ed.D.

Dr. Hart spent 30 years in K-12 education in the greater Charlotte metro area, including serving as a superintendent of Hickory City Schools (NC, 3,800 students), which is located within Catawba County. He is currently an associate clinical professor and coordinator in the Department of Educational Leadership at UNC Charlotte. Among other publications, he recently co-authored a book chapter about the school funding mechanism in North Carolina.

Dr. Hart’s professional affiliations include the National Education Finance Academy and the North Carolina Association of School Administrators. In partnership with the North Carolina School Boards Association, he facilitates training sessions for local boards of education. On this project, he will be tasked with analyzing the [governance, policy, and procedures areas](#).



Paul Tate, M.Ed.

Mr. Tate brings to this project 40+ years of experience as a teacher, curriculum writer, and district administrator. In Dalls ISD (TX, 143,000 students) he was an executive director the for the division of academic support, which included supervising the department of personnel services. He then served 10 years as the assistant superintendent of human resources for Mobile County Schools (AL, 52,600 students).

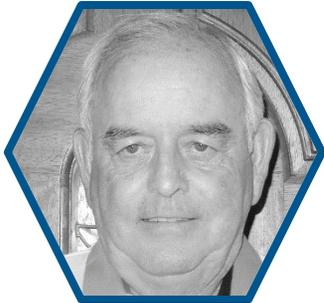
A Prismatic consultant since 2009, Mr. Tate has worked on projects in 11 states, typically in the areas of HR, district organization, and staffing. On this project, he will lead the analysis of [personnel](#) areas in each district.



Jonathan Hutchinson, AIA,  
NCARB, LEED AP

Mr. Hutchinson, a licensed architect, brings more than 20+ years of experience to the team. For Charlotte-Mecklenburg Schools, he has completed facilities condition analyses, feasibility studies, and design of facility renovations and additions. His work includes Elizabeth Lane Elementary, Billingsville Elementary, McClintock Middle, and Piedmont Middle, as well as various non-K-12 facilities.

A Prismatic consultant since 2016, Mr. Hutchinson has worked on projects for Laramie School District #1 (WY, 14,100 students) and Houston ISD (TX, 194,600 students). On this project, he will confirm each school district’s facilities assessment work and analyze [facilities](#) options.



Jerry Williams, CPA

Mr. Williams is a former manager for school performance reviews in the state program administered by the Texas Legislative Budget Board. There, he managed reviews of 50+ school districts.

A Prismatic consultant since 2008, Mr. Williams has worked on projects in Virginia, Rhode Island, Connecticut, Arkansas, Oklahoma, Texas, Virginia, and New Hampshire. He served on the recently completed Reconfiguration Project for ConVal (NH) and is currently on Prismatic projects in Jefferson County Public Schools (KY) and Fairfax County Public Schools (VA). He will be tasked with analyzing the **fiscal impact** of various options on this project.



Freyja Cahill, CPA

Ms. Cahill has 25+ years of financial leadership experience in Brunswick County Schools (NC, 12,600 students). As CFO, with an annual budget exceeding \$170 million, she has extensive experience and knowledge of NC public schools funding intricacies. One of the major accomplishments of her tenure was the oversight of implementation and management of \$152M in school bond projects.

As a member of North Carolina Association for School Business Officials (NCASBO) she served as president and was a founding member of the curriculum development committee that established a rigorous certification program for school district finance staff across the state. Ms. Cahill will be tasked with analyzing the **fiscal impact** of various options on this project.



Katherine Heck, MBA

Ms. Heck is the Government Finance Advisor at the New Hampshire Municipal Association. She provides education and training and serves as a resource to municipal officials and staff on a variety of government finance and taxation issues, with the goal of assisting them in understanding and successfully performing their fiduciary responsibilities. Prior to that, worked as an independent consultant for local governments and nonprofits across New England. One of her specialist areas is developing outcome-focused financial tools for local governments.

A current school board member for a New Hampshire district, Ms. Heck will be tasked on this project with analyzing the **fiscal impact** of various options on the municipalities and communities affected.





Donna Wittrock

Ms. Wittrock is a past president of the national School Nutrition Association. She is the former director of student nutrition in Denver Public Schools (CO) and the recipient of numerous industry awards. She has served as an instructor for the Colorado Department of Education.

Since 2013, Ms. Wittrock has worked on Prismatic projects in many states, ranging from a small rural district in Oklahoma (106 students) to Seattle Public Schools (WA, 51,000 students) to Houston ISD (TX, 200,000 students). On this project, she will be tasked with considering [food service](#) program impacts.



Doug Carter

Mr. Carter has been a transportation director in multiple New York school districts, managing operations in large, urban and small, rural environments. He is also a former history teacher.

Since 2020, Mr. Carter has worked on Prismatic projects in Kentucky, Virginia, Oklahoma, and New York. In Oklahoma, he has worked with a number of smaller school districts (<1,000 students). In New York, he served as Prismatic’s on-site manager for the transportation of young special needs students across 9 school districts. On this project, he will be tasked with considering [transportation](#) program impacts.



To support the consultants, Prismatic employs a number of technical, analytical, and clerical staff members. These staff members will support stakeholder and community engagement efforts.

# Pricing Proposal

Our proposal includes:

- ◆ 19 onsite visits to Buncombe County, with 75 days spent on-site
- ◆ more than 1,800 hours of consulting time
- ◆ a team of 11 highly qualified PreK-12 consultants

Prismatic's hourly rates are:

Project Role	Hourly Rate
Project Manager	\$185
Consultants	\$165
Technical Support	\$105
Clerical Support	\$47

Direct expenses this project include:

Direct Expense	Amount	How Calculated
Mileage	\$188 per trip	Estimated from Charlotte to Asheville area, roundtrip
Airfare	\$500 per trip	Estimated to Asheville
Hotel	\$159.30 per night	GSA rates
Per Diem	\$64 per day	GSA rates
Rental Car	\$75 per day	Estimated based on local published rates
Miscellaneous office expenses	\$250 per project	Based on prior experience

Our planned hours by role are:

		Project Manager	Consultants	Technical Support	Clerical Support	Total
1	Initiate project	24	120	8	24	176
2	Assess current operations	40	400	8	24	472
3	Develop communications plan	12	40	0	8	60
4	Analyze alternatives	40	328	32	24	424
5	Engage community	60	60	80	60	260
6	Draft report	40	160	24	40	264
7	Develop final report	40	40	24	40	144
8	Provide presentations	16	16	8	4	44
	<b>Total</b>	<b>274</b>	<b>1,164</b>	<b>184</b>	<b>224</b>	<b>1,844</b>

This results in these proposed costs:

Consulting Costs	\$272,228
Travel and Direct Expenses	\$29,315
<b>Total Cost</b>	<b>\$301,543</b>

Prismatic understands that this would be a fixed fee contract and no additional monies beyond the initial contract would be sought in order to complete the proposed scope of work outlined in the RFP. We are prepared to negotiate on our proposed price, on-site time, and individual task effort/deliverables, if desired by Buncombe County. Prismatic's FEIN is 26-4031414.

