## Budget

**ESC of Cuyahoga County (046532) - Cuyahoga County - 2016 - Straight A Fund - Rev 0 - Straight A Fund - Application Number (115)**

**U.S.A.S. Fund #: 466**

Plus/Minus Sheet (opens new window)

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Adjusted Allocation: 0.00

Remaining: -1,000,000.00
Please respond to the prompts or questions in the areas listed below in a narrative form.

**A) APPLICANT INFORMATION - General Information**

1. **Project Title:**
   Partnership for Integrated Enterprise Solutions (PIES)

2. **Project Summary:** Please limit your responses to no more than three sentences.
   The Partnership for Integrated Enterprise Solutions is a shared services delivery model that streamlines district administrative functions.
   
   *This is an ultra-concise description of the overall project. It should only include a brief description of the project and the goals it hopes to achieve.*

3. **Estimate of total students at each grade level to be directly impacted each year.**
   
   *This is the number of students that will receive services or other benefits as a direct result of implementing this project. This does not include students that may be impacted if the project is replicated or scaled up in the future. It excludes students who have merely a tangential or indirect benefit (such as students having use of improved facilities, equipment etc. for other uses than those intended as a part of the project). The Grant Year is the year in which funds are received from the Ohio Department of Education. Years 1 through 5 are the sustainability years during which the project must be fiscally and programmatically sustained.*

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4. Explanation of any additional students to be impacted throughout the life of the project. This includes any students impacted or estimates of students who might be impacted through future scale-ups or replications that go beyond the scope of this project.

100% of the student population associated with the seven school districts identified under The Partnership for Integrated Enterprise Solutions (PIES) will benefit from its cost savings initiatives that allow for more time to be spent on delivering the right services to students—all within their financial constraints.

5. Lead applicant primary contact: - Provide the following information:

First and last name of contact for lead applicant
Jennifer Dodd, Ph.D. - Director of Operations and Development

Organizational name of lead applicant
Educational Service Center of Cuyahoga County

Address of lead applicant
6393 Oak Tree Blvd. Independence, Ohio 44131

Phone Number of lead applicant
216-901-4240

Email Address of lead applicant
Jennifer.Dodd@esc-cc.org

Community School Applicants: After your application has been submitted and is in Authorized Representative Approved status an email will be sent to your sponsoring entity automatically informing the sponsor of your application.

6. Are you submitting your application as a consortium? - Select one checkbox below

☐ Yes
☐ No

If you are applying as consortium, please list all consortium members by name on the "Consortium Member" page by clicking on the link below. If an educational service center is applying as the lead applicant for a consortium, the first consortium member entered must be a client district of the educational service center.

Add Consortium Members

7. Are you partnering with anyone to plan, implement, or evaluate your project? - Select one checkbox below

☐ Yes
☐ No

If you are partnering with anyone, please list all partners (vendors, service providers, sponsors, management companies, schools, districts, ESCs, IHEs) by name on the "Partnering Member" page by clicking on the link below.

Add Partnering Members

8. Describe the innovative project: - Provide the following information

The response should provide a clear and concise description of the project and its major components. The following questions will address specific outcomes and measures of success.

a. The current state or problem to be solved; and

Education is the key to Ohio's economic growth and its ability to compete in a global economy. When merged with technology, education becomes transformative for student learning. According to the U.S. Department of Education's 2010 National Education Technology Plan, technology is not just about learning, but also about administrative productivity. For many years, school districts in Ohio have utilized the State's Software that includes the Uniform School Accounting System (USAS), the Uniform Staff Payroll System (USPS), and the Equipment Inventory Subsystem (EIS). Each of these functions operates like 'silos' for different decision-making purposes. The result is an outdated architecture that sub-optimally handles short-term tactical needs, limits productivity, and inhibits school districts from scaling efficiently over the long term. For instance, when utilizing State Software, school districts are unable to receive backup documentation necessary to convert requisitions into purchase orders in a timely fashion. District staff spend a considerable amount of time extracting data and creating reportable data. Furthermore, neither USAS nor USPS has a human resource (HR) module. Many schools use a combination of spreadsheets, homegrown databases, Word docs, paper files, etc. to maintain their data. This lack of centralization leads to inconsistencies and prohibits data utilization for payroll, accounting, and purchasing. To address this deficiency, 7 school districts in Northeast Ohio (Fairview Park, Lakewood, North Royalton, Westlake, Amherst Exempted Village, Avon Lake), representing 24,813 students, will implement an innovative enterprise resource planning solution that combines Financial, HR, and Procurement functions under the Partnership for
b. The proposed innovation and how it relates to solving the problem or improving on the current state.

In 2014, a task force of CFO's and Treasurers from the Ohio Association of School Business Officials Board of Directors looked into the viability of several enterprise systems to meet the administrative needs of Ohio school districts. After careful consideration, they unanimously recognized that the solution to meeting that need is Tyler Technologies’ Munis Financial Management & Human Resources Software Solutions for Schools—also known as "Munis." This grant application, therefore, serves as a great opportunity for the Ohio Department of Education to provide seed money for seven Northeast Ohio school districts to pilot the use of Munis under the Partnership for Integrated Enterprise Solutions (PIES). The overall goals of PIES is to (1) join under similar service arrangements to implement an enterprise resource planning solution that allows for the alignment of financial, HR and procurement services between seven districts, (2) Lower costs by reducing replication of work, (3) Eliminate paper processes and create more cost-efficient means of communication and access to information by implementing innovative web- and mobile-based technologies and electronic work-flow procedures, (4) Increase transparency in government, and (5) reduce the costs of administrative operations while shifting the use of resources into classrooms. The most critical component of PIES will be the project oversight provided by the Cuyahoga County Educational Service Center (ESC) and the host capabilities delivered by the North Coast Council (NCC) to all seven districts, which includes technical support for the installation of Munis and its long-term sustainability. Due to its system efficiencies, the use of Munis by the seven PIES school districts will see a Return on Investment in the reduction or shift in the equivalent of one part-time staff member per district within a one-year timeframe. Munis is a state-of-the-art, web-based, and dashboard driven enterprise solution that offers everything that the State Software has, but so much more. It seamlessly integrates all financial, HR and procurement information, and centralizes data and processes, including EMIS reporting. Users only have to enter data once through abridged, user-friendly views, reducing redundancy, increasing efficiency, and improving data quality and integrity. Munis also allows for electronic approvals and accurate decision-making based on easily accessible real-time data. Therefore, Munis will enable PIES school districts to improve efficiencies, better manage decision making, and optimize working capital so as to reduce administrative processes and increase the delivery of services to students. Munis also has additional modules beyond what the State Software provides. It has a seamless turn-key interface and integration with Microsoft Office and allows for more advanced, flexible analytics and reporting. Its budget and expenditure centers allow forecasting and analysis for accurate and successful strategic planning, detailed audit trails, real-time visibility into budget compliance, deviations, and variances, and complete integration with Tyler Technologies’ electronic document management system. The Munis procurement centers allow for requisition entry addressing bid, contract, purchase order, award and vendor payment for real-time transparent processing viewable by employees and vendors. Munis integrates all employee data addressing recruitment, compensation, retention, training and development plans, and uses workflow history, alerts and notifications to track, analyze and evaluate employee productivity, efficiency, and job succession planning. Through a Microsoft Office Communication server and employee presence indicator, HR staff can initiate e-mails directly from employee records. In turn, employees can request leave through a designated portal approval process. Munis also offers mobile friendly app features that allow for remote decision-making.

9. Select which (up to four) of the goals your project will address. For each of the selected goals, please provide the requested information to demonstrate your innovative project. - (Check all that apply)

a. Student achievement

i. List the desired outcomes.
   Examples: fewer students retained at 3rd grade, increase in graduation rate, increased proficiency rate in a content area, etc.

ii. What assumptions must be true for this outcome to be realized?
   Examples: early diagnosis and intervention are needed to support all children learning to read on grade level; project-based learning results in higher levels of student engagement and learning, etc.

iii. Describe any early efforts you have made to test these assumptions (pilot implementation, etc), or how these are well-supported by the literature.

iv. List the specific indicators that you will use to measure progress toward your desired outcome.
   These should be measurable changes, not merely the accomplishment of tasks. Example: Teachers will each implement one new project using new collaborative instructional skills, (indicates a change in the classroom) NOT; teachers will be trained in collaborative instruction (which may or may not result in change).

v. List and describe pertinent data points that you will use to measure student achievement, providing baseline data to be used for future comparison.

vi. How are you prepared to alter the course of your project if assumptions prove false or outcomes are not realized?

b. Spending reductions in the 5 year forecast

i. List the desired outcomes.
   Examples: lowered facility cost as a result of transition to more efficient systems of heating and lighting, etc.; or cost savings due to transition from...
The PIES school districts realize that they must achieve the most value for each dollar spent so that every dollar saved provides students with the resources they need for achievement. They must justify their program; personnel and service costs; adhere to complex and always changing accounting; budgetary and HR reporting standards; be transparent in their procurement processes; be fair in awarding bids to vendors—all with fewer resources and reduced funding. Such issues become compounded by the fact that the PIES districts are facing a shortage of experienced teachers since many are approaching retirement age. Therefore in light of these issues, the PIES school districts will streamline their operations and increase their accountability through the following cost savings measures: OUTCOME 1: The PIES school districts will replace State Software with Munis’ state-of-the-art enterprise resource planning system addressing financial, HR and procurement functionalities. OUTCOME 2: The purchase of Munis by the PIES school districts through the North Coast Council will result in a significant cost-savings for its school districts. OUTCOME 3: The Munis upgrade will improve the efficiency and administrative productivity of staff in addressing the financial, human resources and procurement functions of their school districts through an increase in accuracy resulting in a reduction in downtime from correcting errors, and the repeating of processing steps, and savings. OUTCOME 4: Due to the efficiencies of the Munis system, the seven PIES school districts will be able to reduce or shift the equivalent of one part-time staff member per district from financial, HR or procurement functions within a one-year timeframe.

### ii. What assumptions must be true for this outcome to be realized?

**Example: transition to “green energy” solutions produce financial efficiencies, etc.; or available digital resources are equivalent to or better than previously purchased textbooks.**

In order effect a cost savings, the seven PIES school districts will join in the purchase Munis with the support and oversight of the ESC and NCC. Acquiring Munis will in turn improve the economy, efficiency and effectiveness of their financial, HR, and procurement functions. For example, the Munis FINANCE solution will result in a saving of staff time through: (1) improved insight into district financial information for informed, strategic decision-making, (2) less time devoted to customizing dashboards for each user, and (3) decreased time in preparing monthly reports. Staff savings associated with use of the Munis PROCUREMENT solution will occur through (1) elimination of manual processes, (2) better tracking of procurement processes that ensure accountability, (3) easier access to needed supplies, (4) reductions in check production and PO creation due to eCard use, and (5) faster vendor access to POs, invoices and payments online. Savings associated with the Munis HUMAN CAPITAL MANAGEMENT solution will include: (1) less time for manual processing due to electronic transmission of direct deposits to employees, (2) employee ability to access valuable information, and (3) document approval time reduced from days to hours or minutes.

### iii. Describe any early efforts you have made to test these assumptions (pilot implementation, etc.), or how these are well-supported by the literature.

The seven PIES school districts value Munis because it is an automated enterprise resource planning system that yields tremendous cost savings and improved business productivity through key processes encountered in daily operations (e.g. order management, fulfillment, invoicing, cash collection, expense approvals, and financial consolidation, etc.). Such automation allows school districts to make more informed, timely and accurate decisions because information can be accessed instantly from almost anywhere, without wasting resources on data extraction and the tyding of data from a different source. Although implementation of enterprise resource planning system is a complex undertaking up front, once it adopted, it provides significant improvements such as easier access to reliable information, elimination of redundant data and operations, reduction of cycle times, and increased efficiency hence reducing costs (Zhang et al., 2003). Critical Success Factors of Enterprise Resource Planning Systems Implementation Success in China. Proceedings of the 36th Hawaii International Conference on System Sciences). Hence, the assistance of NCC for the implementation of Munis is critical to the success of the PIES effort. In fact, according to Tyler Technologies 560 school districts in the United States are already using Munis to experience a Return on Investment in their operations. Pilot results include the following (http://www.tylertech.com/solutions/products/school-solutions/school-client-success-stories): FINANCE: Since the Irving Independent School District in Texas acquired Munis, it has dramatically improved its financial information gathering processes for strategic decision making, and has considerably reduced its time in preparing monthly reports. Staff have also been able to select, drill into, rearrange, summarize, report on and analyze their financial data in new, highly useful ways through the use of dashboard templates, business intelligence cubes offering a multi-dimensional look at data, central program reporting of fixed assets, and Microsoft Excel PivotTables. These processes have saved the school district’s IT staff countless hours that previously went into setting up and customizing data for district staff. HUMAN RESOURCES: Rockdale County Public Schools in Georgia, has achieved significant savings addressing HR matters since it acquired Munis seven years ago. Before then the district was overrun with applicant paperwork, paycheck copies after every payroll, open enrollment forms, benefits documentation, W2s and salary notifications. Realizing it needed to reduce cost and increase efficiency for applicant tracking, open enrollments, and payroll, it implemented the Munis Financial and HR/Payroll software that has produced a significant Return on Investment and return on effort. Online enrollment now allows employees to see their W2s, salary notifications, sick leave, and paychecks. Personal information is managed by each employee so that it is up-to-date and accurate. Staff have reduced their hours as related to perspective employees (50 hours), and producing payroll check copies (10-20 hours). PROCUREMENT: Norfolk Public Schools in Virginia has dramatically reduced its time from requisition to PO creation. Where previous paper requisitions were slowly routed manually from desk to desk, and between buildings and schools, the electronic requisitions under Munis now allow requisitions to be approved quickly without delay. The effort has allowed procurement employees to be redeployed elsewhere within the district. In fact, automation resulted in a 500% increase in the number of procurement transactions managed (10,000 in 2003, more than 50,000 a year today) including a Return on Investment of 20% less in the purchase price of all items. Automation also resulted in 60% fewer number of checks printed, 49% fewer number of PO’s created, 67% fewer number of AP checks written, and 76% fewer number of invoices created.

### iv. List the specific indicators that you will use to monitor progress toward your desired outcome.

**These should be specific dollar savings amounts. THESE MUST MATCH THE COST SAVINGS AS PROJECTED IN THE FINANCIAL IMPACT TABLE (FIT).**

According to the Combined Budget of FIT, the expected annual savings for the seven PIES school districts is $75,864. The savings is the direct result of the reduction of .50 FTE (full-time equivalent) administrative staff, average salary of $35,000 that will no longer be necessary upon the implementation of the Munis software. The savings to the seven PIES school districts is shared, per student ADM, under an innovative service agreement between the seven boards of education. Paper and ink cartridge reduction will result in cost-savings of an estimated at $6,000 ($1,000 per district). Each district, in turn, will purchase a Munis software license separately for their technology platforms. North Coast Council has negotiated a group rate for the software. Therefore, an annual sustainability subscription cost for ranging from $10,320 to $32,784 per year is built into the project for the ongoing annual cost of the Munis licenses. Other costs added to the grant are one-time implementation costs that do not affect sustainability (hardware purchases, training). NCC with the support of Tyler
v. List and describe pertinent data points that you will use to measure spending reductions, providing baseline data to be used for future comparison.

**DATA POINT 1:** Seven Ohio school districts, as the PIES consortium, will purchase the Munis enterprise system at a collective cost-savings of 89%. [Baseline: zero districts have purchased Munis licenses.] **DATA POINT 2:** The Munis upgrade will improve the efficiency and administrative productivity of staff from the seven PIES school districts in addressing the financial, HR and procurement functions of their school districts through: (a) an 100% increase in accuracy resulting in a 100% reduction in downtime from correcting errors and the repeating of processing steps, and (b) reduction of one .50 FTE staff per district within a one-year timeframe. [Baseline: Current staff time devoted to addressing financial, HR and procurement functions in each district.]

vi. How are you prepared to alter the course of your project if assumptions prove false or outcomes are not realized?

Barring any unforeseen technical delays before launching Munis, the collection of data regarding staff use of Munis functionalities will determine whether NCC needs to provide additional training and communications support on its use. Since feedback will be collected by NCC on a monthly basis during the first 18 months of the Munis project, issues can be easily identified, and adjustments quickly made to ensure the fulfillment of realistic expectations. [See also the evaluation section of this proposal.]

c. Utilization of a greater share of resources in the classroom

i. List the desired outcomes.

*Example: change the ratio of leadership time spent in response to discipline issues to the time available for curricular leadership.*

ii. What assumptions must be true for this outcome to be realized?

*Examples: improvements to school and classroom climate will result in fewer disciplinary instances allowing leadership to devote more time to curricular oversight.*

iii. Describe any early efforts you have made to test these assumptions (pilot implementation, etc), or how these are well-supported by the literature.

iv. Please provide the most recent instructional spending percentage (from the annual Ohio School Report Card) and discuss any impact you anticipate as a result of this project.

*Note: this is the preferred indicator for this goal.*

v. List any additional indicators that you will use to monitor progress toward your desired outcome. Provide baseline data if available.

*These should be specific outcomes, not just the accomplishment of tasks. Example: fewer instances of playground fighting.*

vi. How are you prepared to alter the course of your project if assumptions prove false or outcomes are not realized?

d. Implementing a shared services delivery model

i. List the desired outcomes.

*Examples: increase in quality and quantity of employment applications to districts; greater efficiency in delivery of transportation services, etc.*

The Partnership for Integrated Enterprise Solutions (PIES) was formed to promote a shared services delivery model so that seven Northeast Ohio school districts could upgrade their current administrative software with the state-of-the-art Munis enterprise resource planning system. All PIES school districts will have full access to Munis with the hosting support of NCC that includes installation, technical and training oversight. Thus, the PIES school districts will experience a significant increase in operational effectiveness through the use of Munis. Specific outcomes include: Outcome 1 (Finance): Use of the Munis ERP Financial and Accounting Software Solution will allow the PIES school districts easy access to data and the right tools for measuring program performance related to projecting, analyzing and forecasting of budgets. Districts will have real-time visibility into district finances, improved accountability, transparency and responsiveness, efficient management of financial operations, and the opportunity to align their programs and processes with strategic financial goals. Outcome 2 (HR): Use of the Munis Human Capital Management ERP Software Solution will provide the PIES school districts access to analytic functions for assessing the needs of their workforce. Districts will be able to more efficiently recruit and source employees, provide employee training and educational opportunities for skill development, and institute the type of performance management that allows school leaders to make impactful strategic decisions regarding employee career paths and succession planning. Outcome 3 (Procurement): Use of the Munis Procurement ERP Software Solution will provide the PIES school districts access to a fully integrated electronic purchasing system for managing the processes associated with requesting, reviewing, contracting and purchasing, resulting in the streamlining of their entire procurement lifecycles.

ii. What assumptions must be true for this outcome to be realized?

*Example: neighboring districts have overlapping needs in administrative areas that can be combined to create efficiencies.*

A recent survey by the NCC has confirmed that the PIES school districts are still using State Software for their financial and procurement activities. These functions are not integrated, require multiple overlapping databases, do not address HR automation needs, and hinder staff from addressing business performance in a timely fashion. Staff are bogged down with inefficient and disjointed processes, which...
have increased errors and have taken staff away from more important core duties. The districts, therefore, are primed to implement an integrated enterprise resource planning solution such as Munis to improve their financial, accounting, procurement and HR activities with the support of the North Coast Council (NCC). In 1979, the Ohio State Assembly established the Ohio Education Computer Network (OECN). Soon afterward Information Technology Centers were formed to deliver cost-effective and comprehensive educational technology services to Ohio's K-12 schools. One of the newly formed Centers was NCC, which provides school districts with administrative software applications and support addressing financial, student information, EMIS, and library automation. NCC is the ideal partner for assisting the PIES school districts with the purchasing and implementation of Munis. First, NCC has years of experience in purchasing, installing, and configuring software solutions for school districts related to finance, accounting, procurement, payroll, and other related services. Second, NCC can support the sustained implementation of Munis in seven school districts from Northeast Ohio through several experienced IT professional staff, unlimited training support and a regularly maintained help desk.


iv. List the specific indicators that you will use to monitor progress toward your desired outcomes. These should be measurable changes, not the accomplishment of tasks.

Training, communication, and staff participation are the most important factors for ensuring successful Munis implementation. Therefore the PIES school districts, with the support of NCC, will track the following indicators on a monthly basis (first 18 months of launch) for all staff associated with the implementation and maintenance of Munis: INDICATOR 1: All PIES school districts successfully test-pilot Munis functionalities within their respective district departments before the full roll-out. INDICATOR 2: PIES school district staff regularly use all pertinent financial, accounting, HR and procurement functionalities of Munis for their business operations. INDICATOR 3: School district staff and administrators are engaged and adopt fully and positively Munis functionalities through participation in regular training and a communication plan developed and managed by NCC.

v. List and describe pertinent data points that you will use to evaluate the success of your efforts, providing baseline data to be used for future comparison.

Example: consolidation of transportation services between two districts.

DATA POINT 1: 100% of the PIES school districts successfully test-pilot Munis financial, HR and procurement functionalities with their respective departments before full roll-out, which minimize troubleshootings issues by 90% for full launch and implementation. [Baseline: zero districts have installed Munis for testing and full-scale implementation.] DATA POINT 2: Regular daily utilization of Munis financial, HR and procurement functionalities by staff within the respective school districts increasing processing efficiencies by 100%. [Baseline: zero districts are utilizing Munis functionalities.] DATA POINT 3: 100% of end-users (e.g. staff, administrators, etc.) within the PIES consortium have fully and positively adopted Munis through participation in regular training and a communication strategy managed by NCC. [Baseline: zero staff have positively adopted the use of Munis functionalities.]

vi. How are you prepared to alter the course of your project if assumptions prove false or outcomes are not realized?

Barring any unforeseen technical delays before launching Munis, the collection of data regarding staff use of Munis functionalities will determine whether NCC needs to provide additional training and communications support on its use is needed. Since feedback will be collected by NCC on a monthly basis during the first 18 months of the Munis project, issues can be easily identified, and adjustments quickly made to ensure the fulfillment of realistic expectations. [See also the evaluation section of this proposal.]

10. Which of the following best describes the proposed project? - (Select one)
11. Financial Information: - All applicants must enter or upload the following supporting information. The information in these documents must correspond to your responses in questions 12-19.

a. Enter a project budget in CCIP (by clicking the link below)

Enter Budget

b. If applicable, upload the Consortium Budget Worksheet (by clicking the Upload Documents link below)

Upload Documents

The project budget is entered directly in CCIP. For consortia, this project budget must reflect the information provided by the applicant in the Consortium Budget Worksheet. Directions for the Financial Impact Table are located on the first tab of the workbook. Applicants must submit one Financial Impact Table with each application. For consortium applications, please add additional sheets instead of submitting separate Financial Impact Tables.

1,000,000.00 12. What is the amount of this grant request?

13. Provide a brief narrative explanation of the overall budget. Responses should provide a rationale and evidence for each of the budget items and associated costs outlined in the project budget. In no case should the total projected expenses in the budget narrative exceed the total project costs in the budget grid.

Purchased Services: For each of the PIES school districts, there is a one-time district implementation cost of $67,375 ($9,625 x 7 districts) and one-time student implementation cost of $111,852 (ADM/district: $8,298 (Fairview), $24,588 (Lakewood), $20,349 (North Royalton), $17,055 (Westlake), $16,970 (Amherst), $16,853 (Avon Lake), $7,740 (Poliars)) for the purchase of Tyler Technologies’ Munis Financial Management & Human Resources Software Solutions for Schools (Munis). The Munis solution will interface with the districts’ current financial (e.g., payroll and accounting), HR and procurement software and enable the staff to significantly reduce the amount of paper, hours, filing, and data input to process the work in the businesses departments of the seven PIES school districts. Training costs for staff are included within the purchase of the Munis system. Staff will be trained in the operation of Munis by the North Coast Council (NCC) Team (with the support of Tyler Technologies for Wave 1 districts) and will participate in an overall Munis implementation strategic planning session. Purchased Services also include costs for the districts’ software licenses (for years 1 and 2 of the grant initial roll-out years) at $149,136 and the cost of NCC’s software license fee for 6 years at $120,000. Since Munis requires ongoing annual licenses, the seven PIES school districts will pay for the licenses during years 3-6 of the grant (based on per student ADM), which includes ongoing professional development and support, if needed. Other purchased services include $60,000 for the evaluation and $5,820 for the fiscal services and or oversight costs of the Cuyahoga County ESC. Capital Outlay of $262,000 will include hardware purchases for central located at NCC. NCC’s Purchased Services cost to manage the entire project plus fiscal services for the seven PIES school districts will cost an initial one-year fee of $85,000. Overall, project management and implementation costs cover all of the ‘intangible’ items related to implementing Munis (e.g., the costs associated with ‘service/work’ such as data conversion, training, software installation, etc.), the cost to physically install Munis software application onto district servers. The evaluation or audit will cost $60,000 over a six-year timeframe. The total cost of the project is $1,000,000, while $596,544 represents costs that must be sustained on an annual basis.

14. Please provide an estimate of the total costs associated with maintaining this program through each of the five years following the initial grant implementation year (sustainability costs). This is the sum of expenditures from Section A of the Financial Impact Table.

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<td>149,136.00 e. Sustainability Year 5</td>
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15. Please provide a narrative explanation of sustainability costs. Sustainability costs include any ongoing spending related to the grant project after June 30, 2017. Examples of sustainability costs include annual professional development, staffing costs, equipment maintenance, and software license agreements. To every extent possible, rationale for the specific amounts given should be outlined. The costs outlined in this narrative section should be consistent and verified by the financial documentation submitted and explained in the Financial Impact Table. If the project does not have sustainability costs, applicants should explain why.

Annual sustainable costs related to the implementation of the innovative shared services model include the annual software licenses (years 3-8) required to create the efficient work model using the latest workflow techniques available in business processes. These software license
100 16. What percentage of these costs will be met through cost savings achieved through implementation of the program?

Total cost savings from section B of the Financial Impact Table divided by total sustainability cost from section A of the Financial Impact Table. If the calculated amount is greater than 100, enter 100 here.

17. Please explain how these cost savings will be derived from the program.

Applicants who selected spending reductions in the five-year forecast as a goal must identify those expected savings in questions 16 and 17. All spending reductions must be verifiable, permanent, and credible. Explanation of savings must be specific as to staff counts; salary/benefits; equipment costs, etc.

The true "innovative" benefit of the PIES or shared services delivery model is that each of the seven PIES school districts receive a percentage of the savings in installation and subscription costs to use Munis based upon the total enrollment of each district. For example, the up-front cost to implement Munis without the benefit of NCC's support is $267,000 [includes One-Time License Fee = $95,000, Implementation Services = $155,000 (includes travel and living), and On-going Annual Maintenance/Support Fee = $17,000/year]. But purchasing Munis through NCC, on average, costs each school district $28,987 in up-front cost is $28,987 [includes Annual Subscription Fee = 1844 x $6/student = $11,064/year, and District and Student Implementation (1 time only fee) = $17,923]. That is a cost savings of 89%. Thus PIES utilizes the approach that all seven districts benefit from the same opportunity. This reduction will be realized immediately during the first year of the grant and will continue for the next five years of the grant. Munis is an enterprise software solution that allows for the implementation of web- and mobile-based technologies to streamline tasks and procedures. As such it will also offer savings in the amounts of a .5 FTE reduction in personnel related costs ($35,000 salary + benefits) related to the use of Munis and increased efficiencies through elimination of work redundancy and implementation of more efficient workflow processes. A significant amount of paper will be reduced as the districts move to a 100% "green" organization goal. The estimated amount of paper and print cartridge savings is conservatively set at $1,000 for a total of $7,000 across the seven PIES school districts. Other anticipated outcomes reduction of office space and overhead costs due to coordinated workflow processes. All efficiencies realized by operational savings will directly impact the amount of resources available for classroom instruction, which is at the discretion of each district.

0 18. What percentage of sustainability costs will be met through reallocation of savings from elsewhere in the general budget?

Total reallocation from section C of the Financial Impact Table divided by total sustainability cost from section A of the Financial Impact Table Note: the responses to questions 16 and 18 must total 100%

19. Please explain the source of these reallocated funds.

Reallocation of funds implies that a reduction has been made elsewhere in the budget. Straight A encourages projects to determine up front what can be replaced in order to ensure the life of the innovative project.

Reallocating costs include the yearly Munis licensing fee renewals paid for in savings realized from Munis efficiencies resulting in a .5 FTE staff reduction. Therefore reallocation of costs are not anticipated.

D) IMPLEMENTATION

20. Please provide a brief description of the team or individuals responsible for the implementation of this project, including other consortium members or partners.

This response should include a list of qualifications for the applicant and others associated with the grant. Please list key personnel only. If the application is for a consortium or a partnership, the lead should provide information on its ability to manage the grant in an effective and efficient manner. Include the partner/consortium members' qualifications, skills and experience with innovative project implementation and projects of similar scope.

Enter Implementation Key Personnel information by clicking the link below:

Add Implementation - Key Personnel

For Questions 21-23 please describe each phase of your project including its timeline, and scope of work.

A complete response to these questions will demonstrate awareness of the context in which the project will be implemented and the time it will take to implement the project with fidelity. A strong plan for implementing, communicating and coordinating the project should be apparent, including coordination and communication in and amongst members of the consortium or partnership (if applicable). Not every specific action step need be included, but the outline of the major steps should demonstrate a thoughtful plan for achieving the goals of the project. The timeline should reflect significant and important milestones in an appropriate time frame.

21. Planning

a. Date Range - completed

b. Scope of activities - include all specific completion benchmarks.

North Coast Council (NCC) and other Information Technology Centers in Ohio have been notified that Ohio's Software System-the same one that many school districts had been using for over 25 years-is to be upgraded. However, the State Software Development Team also indicated that there will be a considerable delay in the upgrade and that it would not feature certain accounting and payroll functions that other ERP software packages already offer to the business sector. The Ohio Association of School Business Officials (OASBO) then organized a
E) SUBSTANTIAL IMPACT AND LASTING VALUE

24. Describe the expected changes to the instructional and/or organizational practices in your institution.

The response should illustrate the critical instructional and/or organizational changes that will result from implementation of the grant and the impact of these changes. These changes can include permanent changes to current district processes, new processes that will be incorporated or the removal of redundant processes. The response may also outline the expected change in behaviors of individuals (changes to classroom practice, collaboration across district boundaries, changes to a typical work day for specific staff members, etc.). The expected changes should be realistic and significant in moving the institution forward.

Please enter your response below:

NCC is an expert in providing school districts with computer software and support for financial software applications, student information system applications, human resource applications, EMIS software, library automation software and Internet services. It also regularly works with groups of school districts to have equal access to software services regardless of their student enrollment. Therefore, the NCC will assist the seven PIES districts with a team of professional support staff who will answer questions about how to perform certain tasks within the application software, as well as who provide initial and continuing training in the use of the application software. Professional support
25. Please provide the name and contact information for the person and/or organization who will oversee the evaluation of this project.

Projects may be evaluated either internally or externally. However, evaluation must be ongoing throughout the entire period of sustainability and have the capacity to provide the Ohio Department of Education with clear metrics related to each selected goal.

Please enter your response below:
Jeffrey D. Neuman, CPA, JD President Barnes Wendling CPAs jdn@barneswendling.com 800-369-6375 1350 Euclid Ave. Suite 1400 Cleveland, Ohio 44115-1830

26. Describe the overall plan for evaluation, including plans for data collection, underlying research rationale, measurement timelines and methods of analysis.

This plan should include the methodology for measuring all of the project outcomes. Applicants should make sure to outline quantitative approaches to assess progress and measure the overall impact of the project proposal. The response should provide a clear outline of the methods, process, timelines and data requirements for the final analysis of the project’s progress, success or shortfall. The applicant should provide information on how the lessons learned from the project can and will be shared with other education providers in Ohio. Note: A complete and comprehensive version of the evaluation plan must be submitted to ODE by all selected projects.

PIES has secured the services of Barnes Wendling CPAs to conduct a third-party objective performance evaluation or audit to determine whether Munis helps Ohio school districts to improve performance, reduce costs, and make informed data-driven decisions. The audit will ensure that the proper planning is in place to launch Munis so as to reduce the risk of unanticipated costs. The performance audit will be conducted in accordance with generally accepted government auditing standards. Barnes Wendling CPAs will ensure the audit obtains sufficient, appropriate evidence to provide a reasonable basis for its findings and conclusions based on the audit objectives. The audit scope will address pre- and post-implementation of Munis within the school districts. The post-implementation component of the audit will serve as a benchmark for assessing progress and determining whether Munis is executed as planned. The audit will assess: (1) Project/contract management, NCC Team training, project requirements and blueprint management; (2) School district staff training and communication methodology; (3) Pre-launch cross walks, mock conversion testing cycles, etc.; (4) Reporting related to the launch strategy, and requirements prior to go-live and post-go-live support; (5) Post-launch, monitoring of Munis adoption and impact on a school district’s business performance where baselines will be compared to post-implementation performance measures; (6) Staff transition to Munis determined by effective knowledge transfer and overall support to change management; (7) Retiring systems management related to historical data storage, access, system phase out; (8) Security implementation; (9) Satisfaction surveys administered to stakeholders (e.g., employees, administrators, IT departments) and vendors; and (10) Opportunities for improvement. This last category will include determining whether staff can benefit from additional or ongoing training. A year after the launch of Munis, an analysis will be conducted to compare the actual versus projected costs and benefits of Munis. The program review will determine whether districts: (A) purchased Munis at a collective cost-savings of 89%; (B) improved their efficiency and administrative staff productivity in the financial, HR and procurement "functionalities" through a 100% increase in accuracy resulting in a 100% reduction in downtime from correcting errors and data repeating of processing steps, and an overall savings of one 50 FTE staff per district within a one-year timeframe. [Baseline: Current staff time devoted to addressing Munis functionalities in each district.]* Other measures of the audit will include addressing whether districts: (A) successfully test-piloted Munis functionalities within their respective district departments before full roll-out which minimized troubleshoot issues by 90% for full launch and implementation, (B) regularly use all Munis functionalities for their business operations, (C) have staff and administrators engaged by fully adopting Munis functionalities through participation in regular training and a communication plan developed and managed by NCC, (D) exhibit regular daily use of Munis functionalities by staff within the respective districts increasing processing efficiencies by 100%, (F) have 100% of end-users (e.g. staff, administrators, etc.) fully and positively adopting Munis through participation in regular training and a communication strategy managed by NCC. Each of the participating district’s boards of education will receive a summative audit assessing the implementation of the grant’s major components, documenting the areas in need of improvement, if necessary. The Barnes Wendling CPAs will include recommendations for improvement at all milestone reviews (end of 2017 and 2018) and in the final summative performance audit (end of 2020).

27. Please describe the likelihood that this project, if successful, can be scaled-up, expanded and/or replicated. Include a description of potential replications both within the district or collaborative group, as well as an estimation of the probability that this solution will prove useful to others.

*Other measures of the audit will include addressing whether districts: (A) successfully test-piloted Munis functionalities within their respective district departments before full roll-out which minimized troubleshoot issues by 90% for full launch and implementation, (B) regularly use all Munis functionalities for their business operations, (C) have staff and administrators engaged by fully adopting Munis functionalities through participation in regular training and a communication plan developed and managed by NCC, (D) exhibit regular daily use of Munis functionalities by staff within the respective districts increasing processing efficiencies by 100%, (F) have 100% of end-users (e.g. staff, administrators, etc.) fully and positively adopting Munis through participation in regular training and a communication strategy managed by NCC. Each of the participating district’s boards of education will receive a summative audit assessing the implementation of the grant’s major components, documenting the areas in need of improvement, if necessary. The Barnes Wendling CPAs will include recommendations for improvement at all milestone reviews (end of 2017 and 2018) and in the final summative performance audit (end of 2020).
Discuss the possibility of publications, etc., to make others aware of what has been learned in this project.

The response should provide an explanation of the time and effort it would take to implement the project in another district, as well as any plans to share lessons learned with other districts. To every extent possible, applicants should outline how this project can become part of a model so that other districts across the state can take advantage of the learnings from this proposed innovative project. If there is a plan to increase the scale and scope of the project within the district or consortium, it should be noted here.

The replication of the PIES effort and the acquisition of Munis for seven school districts in Northeast Ohio by other school districts in can easily be replicated as a cost-effective initiative. In fact, due to the efforts of PIES in planning for this grant proposal, another 20 school districts in Northeast Ohio and the Educational Service Center of Cuyahoga County have expressed their interest in joining the PIES effort and acquiring Munis upon completion of the Wave 1 rollout process. The school districts include: Avon Local Schools, Bay Village City Schools, Bedford City Schools, Brecksville-Broadview Hts City Schools, Brooklyn City Schools, Cuyahoga Valley Career Center, East Cleveland City Schools, Elyria City Schools, Euclid City Schools, Garfield Heights City Schools, Highland Local Schools, Independence Local Schools, Keystone Local Schools, Lorain County Joint Vocational School, Midview Local Schools, North Ridgeville City Schools, Olmsted Falls City Schools, Rocky River City Schools, Shaker Heights City Schools, and South Euclid-Lyndhurst City Schools. All of these school districts will benefit from the significant and discounted cost-savings associated with acquiring Munis through the efforts of the North Coast Council (NCC) and the collaboration of the seven PIES school districts. In fact, the annual subscription savings for any district that joins in the effort will realize a continued annual Munis subscription savings. In addition all Munis product and feature upgrades are free of charge as part of the maintenance contract. This means: (1) NCC and school districts will never have to purchase a new version of Munis software, (2) upgrades and new releases are released throughout the year, and school districts can incorporate changes and advancements when they are ready, greatly reducing the disruption to employee work, and (3) there remains a significantly lower total cost of ownership compared to other fund accounting and budgeting systems. Over the long-term, PIES will be sustained because it focuses on maintaining the following three 'critical success factors': TRAINING: Training is crucial to the success of the Munis implementation. User empowerment will start day one by training in the design and functionality of Munis. This ensures that end-users not completely reliant on NCC for making every minor tweak and modification. By quickly educating and training school district staff, ownership of Munis will increase, which in turn allows for a faster and more efficient response to problems and upgrades. Staff will know how Munis works and how it relates to their job duties. Training will be readily and broadly available through NCC so as to encourage the acceptance of Munis and to help overcome staff resistance. Training will be offered before, during, and after the implementation to ensure staff operational knowledge. TOP MANAGEMENT SUPPORT: The foundation of any successful organizational change revolves around leadership, an ability to set politics aside, and a willingness to collaborate, agree, and commit to the change process. Therefore, superintendents of the seven PIES school districts will support each step of the Munis implementation plan and within all of their district organizational levels. Since there will be consistent, managerial backing at every level, staff will be driven toward the common goal of accepting and adapting Munis. Such leadership will sharply reduce the behavioral resistance to change, especially when dealing with new technologies. EFFECTIVE COMMUNICATION: Before and during the implementation of Munis, the PIES superintendents will ensure meaningful and effective communication about the system at all levels of their school districts. This is because substantial communication allows for strong teamwork, effective planning, and end-user involvement. The more extensively staff understand a new system, the more willing and able they will be to use it on a regular basis.

By virtue of applying for the Straight A Fund, all applicants agree to participate in the overall evaluation of the Straight A Fund for the duration of the evaluation time frame. The Governing Board of the Straight A Fund reserves the right to conduct an evaluation of the project and request additional information in the form of data, surveys, interviews, focus groups and other related data on behalf of the General Assembly, Governor and other interested parties for an overall evaluation of the Straight A Fund.

PROGRAM ASSURANCES: I agree, on behalf of this applicant, and any or all identified consortium members or partners, that all supporting documents contain information approved by a relevant executive board or its equivalent and to abide by all assurances outlined in the Straight A Assurances (available in the document library section of the CCIP).

I agree, on behalf of this applicant, and any or all identified consortium members or partners, that all supporting documents contain information approved by a relevant executive board or its equivalent and to abide by all assurances outlined in the Straight A Assurances (available in the document library section of the CCIP). /s/ Jennifer Dodd, Ph.D., Director of Operations and Development, Cuyahoga County Educational Service Center /s/ John Mitchell, Executive Director, North Coast Council
## Consortium Contacts

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Telephone Number</th>
<th>Email Address</th>
<th>Organization Name</th>
<th>IRN</th>
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<th>Delete Contact</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Hendricks</td>
<td>(440) 356-3500</td>
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<tr>
<td>Bill</td>
<td>Lane</td>
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<td>Neuman</td>
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<td><a href="mailto:jdn@barneswendling.com">jdn@barneswendling.com</a></td>
<td>Barnes Wendling CPAs</td>
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<td>1350 Euclid Ave. Suite 1400, Cleveland, OH, 44115-1830</td>
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<td>First Name</td>
<td>Last Name</td>
<td>Title</td>
<td>Responsibilities</td>
<td>Qualifications</td>
<td>Prior Relevant Experience</td>
<td>Education</td>
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<td>Jennifer</td>
<td>Dodd</td>
<td>Director of Operations</td>
<td>Ms. Dodd’s role will be one of team facilitator assisting North Coast Council in the alignment of PIES duties. Ms. Dodd will serve as the chief liaison to the boards of education ensuring that all questions or concerns from any of the school board members, or partnering superintendent are answered. Ms. Dodd will ensure that the districts are fairly represented and that consistency in customer service is a key focus. Ms. Dodd will serve as the secondary contact on the project in the event Mr. Mitchell is not available.</td>
<td>Qualifications: Degrees- B.A. Psychology, M.Ed. Early Childhood Special Education, Ph.D. Urban Education Policy; Licensure-PreK-3 Intervention Specialist, K-9 Principal, Superintendent (in progress)</td>
<td>Prior relevant experience: Jennifer Dodd is the Director of Operations and Development at the Educational Service Center (ESC) of Cuyahoga County. Prior to working at the ESC, Jennifer worked as a special education teacher in Independence Schools. Her responsibilities include operations and facility management; financial planning; services development; regional expansion through shared services; P-16 cross-system efforts with early childhood, higher education and social agencies; grant/project coordination; data collection and research; and educational budget and policy review.</td>
<td>BS Psychology, MS Early Childhood Special Education &amp; Ph.D. in Urban Education, Cleveland State University; Early Intervention &amp; Principal</td>
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<td>John</td>
<td>Mitchell</td>
<td>Executive Director</td>
<td>Mr. Mitchell will manage the PIES project. He will develop a shared services agreement for financial services to be adopted by the seven district boards of education for seven school districts and he will communicate the planned changes in administrative operations with district staff. He will understand the current practices and procedures of financial, HR and procurement processes of each district so as to ensure a more seamless transition to Munis, all while maintaining separate distinct entities and proprietary and confidentiality of the information of the four districts involved. Mr.</td>
<td>John W. Mitchell is the Executive Director of North Coast Council. He has been with NCC since 2000. John is responsible for the management of the North Coast Council.</td>
<td>John has worked in a variety of technology-related positions. Prior to joining North Coast Council, he was the Director of Management Information Systems of the Ohio Turnpike Commission headquartered in Berea, Ohio, Technical Support Manager at Ameritrust Bank in Cleveland, Ohio and a Systems Analyst for Vipont Pharmaceuticals in Fort Collins, Colorado. John is currently Co-Chairman of the INFOhio Governing Board and a member of the INFOhio Executive Committee. He is a recipient of the Certificate of Special Recognition from the Ohio Education Computer Network and the</td>
<td>Bachelor of Science in Information Systems.</td>
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Mitchell will coordinate tasks and needs between all seven districts' financial, HR and procurement services departments and identify roles, responsibilities and necessary cross training to be developed. Mr. Mitchell will also oversee the PIES evaluation to adequately measure the success of the Straight A grant.

| Noreen Lehmann | Coordinator, Special Projects | Ms. Lehmann will oversee the implementation of the Munis software application that is the basis for creating the efficiencies in operations for PIES. Ms. Lehmann will allocate the appropriate North Coast Council (NCC) staff and resources so that each element of the Munis implementation is tested in advance, and the interface exists between the USAS/USPS/EIS software and Munis software. Ms. Lehmann will also coordinate the installation of hardware in order to ensure that all equipment is procured and built at the capacity level necessary to support the robust software applications being implemented within the seven districts. | Ms. Lehmann has been Coordinator of Special Projects and has been with NCC since 1999. She has the knowledge and understanding of the necessary internal control procedures, networking capabilities, and administrative applications required to successfully implement PIES for the seven districts involved. All seven districts utilize NCC as network provider and financial support services provider. | Ms. Lehmann has her Project Management certificate from Baldwin Wallace College. | Bachelor of Arts in English from the University of Akron; CPA, JD | 20 |

| Jeffrey Neuman | President of Barnes Wendling CPAs | The firm will provide an evaluation or audit of the Munis rollout with particular attention to ROI matters. | Jeff has more than twenty five years of experience working with his clients developing comprehensive strategies related to all aspects of building and maintaining their net worth - business development, retirement planning, estate planning, succession planning, and investment planning. He is experienced in serving emerging businesses, step by step, through start-up with timely, personal service and continuity during their Enterprise Services: Barnes Wendling’s team of experienced professionals provides a comprehensive range of technical expertise in accounting, auditing, tax work corporate finance, and advisory services specific to service enterprises or professional service firms. Utilizing the Barnes Wendling team for corporate finance advisory services allows for advice and solutions that truly are in the best interest of the client, independent, | | |
growth period. His clients represent a diversified spectrum of the business community, ranging from manufacturing, distribution, retail and construction industries to long-term and assisted living communities. Jeff is experienced in structuring business transactions, both foreign and domestic, so as to minimize the tax burden and maximize cash flows. His clients turn to him for advice in the areas of estate preservation, insurance and investment options. His approach to client service stresses continuous, active involvement with management. In his view, a key role of the Certified Public Accounting professional is that of “sounding board” or “objective outside observer.” In that role, Jeff brings extensive business experience to his clients and is intimately familiar with their operations and goals. He gives his clients a quick read on issues and provides them with tangible solutions. Jeff also participates as an advisor to his clients in devising growth and exit strategies. He has also provided services to his clients as an advisor in acquisitions, mergers, and sales processes. and free of outside interests. In addition, our team is constantly monitoring changing rules and regulations to remain pro-active.