



## Arlington Public Schools

Procurement Office  
2110 Washington Blvd., Arlington, VA 22204 • Phone: (703) 228-7643 • Fax: (703) 841-0681  
www.apsva.us

November 27, 2023

Via email

Allovue Inc  
Attn: Jessica L. Gartner, Founder & CEO  
1014 West 36th Street, Suite 220  
Baltimore, MD 21211  
Email: [jess@allovue.com](mailto:jess@allovue.com)

Subject: Contract 111FY23 – Review of Specific Staffing Allocations (also known as Planning Factors)

Dear Ms. Gartner:

Amendment No.1 is presented for your signature to modify the Scope of Work and the Pricing Schedule. An Appendix to the Scope of Work and the Pricing Schedule is included with the modifications shown in **Red** for addition and **Black** for deletion.

Please indicate your acceptance by having an officer of your firm sign and return the acceptance portion. Upon receipt, this office will sign and execute the Amendment and return one copy to your office. Your response is requested no later than five (5) days from the date of this letter.

All other terms and conditions shall remain unchanged.

Sincerely,

*Hamed Hameedi*

Hamed Hameedi  
Senior Procurement Specialist/Procurement Office  
Direct: (703) 228-7643  
Email: [hamed.hameedi@apsva.us](mailto:hamed.hameedi@apsva.us)



## Arlington Public Schools

Procurement Office  
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### Amendment No.1

Subject: Contract 111FY23 – Review of Specific Staffing Allocations (also known as Planning Factors)

**Contractor**

Allovue Inc  
1014 West 36th Street, Suite 220  
Baltimore, MD 21211

**Contract No.**

111FY23

By mutual agreement, Amendment No. 1 to Contract No. 111FY23 modifies the Scope of Work and the Pricing Schedule. An Appendix to the Scope of Work and the Pricing Schedule is included with the modifications shown in **Red** for addition and **Black** for deletion.

All other terms and conditions shall remain unchanged.

**Allovue Inc**

**Signature:** *Jessica L. Gartner*

**Title:** Chief Executive Officer

**Printed Name:** Jessica L. Gartner

**Date:** November 27, 2023

**APS:**

**Signature:** *David J. Webb*

**Title:** Procurement Director/Procurement Agent

**Printed Name:** David Webb, C.P.M.

**Date:** November 28, 2023

## SCOPE OF WORK (REVISED AMENDMENT NO. 1)

### **A. Background:**

Arlington Public Schools (APS) has identified a need for a comprehensive review and analysis of its current methodologies and systems used to allocate staffing for students with disabilities, English learner students, and to assess equity in the allocation of resources across all schools. The objective of this review is to evaluate the effectiveness of the current staffing allocation practices and identify any obstacles or bottlenecks hindering their effectiveness. The review will consider the alignment between the current staffing allocation practices and the overall goals and priorities of the School Board, including its Strategic Plan, Priorities, budget direction, as well as the Virginia Standards of Quality. The review will also examine staffing allocations for students with disabilities and English learner students in surrounding districts, assess best practices and emerging trends and innovations, and develop recommendations for optimizing the current staffing allocation processes, procedures, and methodologies. The review will propose new planning factors for students with disabilities, changes in planning factors to ensure greater equity in the allocation of staffing to schools, and optimization of staffing allocation processes for English learner students. The review will provide three implementation options for each recommendation and develop a detailed implementation plan, including training programs and supporting documentation and reference materials (**Optional**). The review will also provide an ongoing evaluation of the impact of the new or optimized processes and allocations, including regular monitoring and reporting on the outcomes. Key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments, will receive a presentation of the findings and recommendations.

### **B. General Information:**

The Scope of Work (Work) outlines the objectives, tasks, and deliverables of the project Review of Specific Staffing Allocations (also known as Planning Factors). The project aims to identify areas for improvement in the current staffing allocations and provide recommendations for optimization. The project will be completed within the estimated timeline and Contract Price, with a focus on quality control to ensure the deliverables meet the required standards.

### **C. Objective:**

APS is seeking to perform a comprehensive review of specific staffing allocations, called planning factors, provided to schools for a variety of positions. Currently, these planning factors provide staffing allocations to schools primarily based on enrollment (e.g., pre K-12 general education, special education, and English Learner) although other data may also be used (e.g., free & reduced lunch percentage). This project aims to identify any inefficiencies, limitations, or areas for improvement, and provide recommendations for optimization. This comprehensive review seeks to understand what best practices are and how surrounding jurisdictions provide staffing to schools in the specific areas outlined in the Scope section below. The review should also consider the inclusion of factors other than enrollment for calculating how staffing should be allocated including, but not limited to:

1. School status (such as Title I or Title I eligible)
2. Size of the Economically Disadvantaged student reporting group population (numerically rather than on school status)
3. Percentage of students in a school with additional needs based on current and historical data overall (multiple reporting groups)
4. Test scores

### **D. Special Education Planning Factors:**

1. Review and analyze the current methodologies and systems used to allocate staffing for students with disabilities in all categories, including identification of any obstacles or bottlenecks that may be hindering their effectiveness.
2. Assess the alignment between the current staffing allocation practices and the overall goals and priorities of Arlington Public Schools including the Strategic Plan, the School Board's Priorities, and the School Board's budget direction.
3. Assess the alignment between the current staffing allocation practices and the Virginia Standards of Quality.

4. Examine staffing allocations for students with disabilities in surrounding districts. Surrounding districts include Alexandria, Falls Church, Fairfax, Loudoun, and Prince William school systems.
5. Assess best practices and emerging trends and innovations in allocating staffing for students with disabilities, to include a review of recommended staffing allocations from national associations.
6. Review the proposal developed by the Office of Special Education (OSE) to change the planning factors for staffing allocations for students with disabilities.
7. Determine if proposed changes from OSE align with what surrounding jurisdictions are doing.
8. Determine if proposed changes from OSE align with best practices and/or emerging trends and innovations.
9. Determine if proposed changes from OSE align with the Virginia Standards of Quality.
10. Determine if factors other than enrollment, as outlined in the Objectives section, should be used to allocate staffing for students with disabilities.
11. Based on the results of the analysis and review, develop recommendations, through a Design Team process, for optimizing the current staffing allocation processes, procedures, and methodologies.
12. Propose new planning factors for students with disabilities that consider best practices, emerging trends, staffing allocations in surrounding jurisdictions, the Virginia Standards of Quality, and any other factors deemed relevant under Section A.8 above.
13. Provide three options for each implementation of proposed new planning factors:
  - a. Option 1 – full implementation in one budget cycle
  - b. Option 2 – phase in implementation over 2 years
  - c. Option 3 – phase in implementation over 3 years
14. Present the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.

**E. Equity Analysis**

1. Assess the alignment between the current staffing allocation practices and the overall goals and priorities of Arlington Public Schools including the Strategic Plan, the School Board's Priorities, and the School Board's budget direction, with a particular focus on how allocating resources equitably can assist in achieving the goal of eliminating opportunity gaps so all students achieve excellence.
2. Review work done in Fall 2022 by Equity Journey Partners and Allovue around planning factors and equity.
3. Examine surrounding districts to determine how they allocate staffing to ensure equity.
4. Assess best practices and emerging trends and innovations in staffing allocations to ensure equity across schools, to include a review of recommended staffing allocations from national associations.
5. Assess the alignment between the current staffing allocation practices and the Virginia Standards of Quality.

6. Determine if factors other than enrollment, as outlined in the Objectives section, should be used to allocate staffing to ensure equity across schools.
7. Based on the results of the analysis and review, develop recommendations for optimizing the current staffing allocation processes, procedures, and methodologies.
8. Propose new planning factors and/or changes in planning factors to ensure greater equity in the allocation of staffing to schools, especially for economically disadvantaged students, that consider best practices, emerging trends, staffing allocations in surrounding jurisdictions, the Virginia Standards of Quality, and any other factors deemed relevant under Section B.5 above.
9. Provide three options for each implementation of proposed new planning factors:
  - a. Option 1 – full implementation in one budget cycle
  - b. Option 2 – phase in implementation over 2 years
  - c. Option 3 – phase in implementation over 3 years
10. Present the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.
11. Develop a detailed implementation plan for the proposed changes, including training programs and supporting documentation and reference materials. (Optional)
12. Provide an ongoing evaluation of the impact of the new or optimized processes and allocations, including regular monitoring and reporting on the outcomes.

**F. English Learner Planning Factors**

1. Review and analyze the current methodologies and systems used to allocate staffing for English learner students, including identification of any obstacles or bottlenecks that may be hindering their effectiveness.
2. Assess the alignment between the current staffing allocation practices and the overall goals and priorities of Arlington Public Schools including the Strategic Plan, the School Board’s Priorities, and the School Board’s budget direction.
3. Assess the alignment between the current staffing allocation practices and the Virginia Standards of Quality.
4. Examine staffing allocations for English learner students in surrounding jurisdictions.
5. Assess best practices and emerging trends and innovations in allocating staffing for English learner students, to include a review of recommended staffing allocations from national associations.
6. Review the Department of Justice Settlement Agreement regarding current staffing allocations for English learner students.
7. Determine if factors other than enrollment, as outlined in the Objectives section, should be used to allocate staffing for English learner students.
8. Based on the results of the analysis and review, develop recommendations, through a Design Team process, for optimizing the current staffing allocation processes, procedures, and methodologies.

9. Propose new planning factors for English learner students that consider best practices, emerging trends, staffing allocations in surrounding jurisdictions, the Department of Justice Settlement Agreement, the Virginia Standards of Quality and any other factors deemed relevant under Section C.7 above.
10. Provide three options for each implementation of proposed new planning factors:
  - a. Option 1 – full implementation in one budget cycle
  - b. Option 2 – phase in implementation over 2 years
  - c. Option 3 – phase in implementation over 3 years
11. Present the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.

**G. Other Planning Factors**

1. Review and analyze the current methodologies and systems used to allocate staffing for the positions listed below, including identification of any obstacles or bottlenecks that may be hindering their effectiveness.
  - a. School testing coordinator
  - b. School social worker
  - c. School psychologist
  - d. School counselor
  - e. Resource teacher for the gifted
  - f. Assistant principal
  - g. Dean of students (secondary level only)
  - h. Minimum and maximum class sizes for grades K-5, 6-8, and 9-12
2. Assess the alignment between the current staffing allocation practices and the overall goals and priorities of Arlington Public Schools including the Strategic Plan, the School Board's Priorities, and the School Board's budget direction.
3. Examine staffing allocations for each of the listed positions in surrounding jurisdictions.
4. Assess best practices and emerging trends and innovations in allocating staffing for each of the above-listed positions, to include a review of recommended staffing allocations from national associations.
5. Assess the alignment between the current staffing allocation practices and the Virginia Standards of Quality.
6. Determine if factors other than enrollment, as outlined in the Objectives section, should be used to allocate staffing for the above-listed positions.
7. Based on the results of the analysis and review, develop recommendations, through a Design Team process, for optimizing the current staffing allocation processes, procedures, and methodologies.

8. Propose new planning factors for the above-listed positions that consider best practices, emerging trends, staffing allocations in surrounding jurisdictions, the Virginia Standards of Quality, and any other factors deemed relevant under Section D.6 above.
9. Provide three options for each implementation of proposed new planning factors for each of the above-listed positions.
  - a. Option 1 – full implementation in one budget cycle
  - b. Option 2 – phase in implementation over 2 years
  - c. Option 3 – phase in implementation over 3 years
10. Present the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.

#### **H. Deliverables:**

At the end of the review, Arlington Public Schools expects to have recommendations for changes to the current planning factors that can be incorporated into the FY 2025 budget and beyond. As outlined in the Scope, the recommendations for changes will encompass proposed changes to the staffing allocations, processes, and procedures for students with disabilities, new or revised staffing allocations that provide greater equity across schools, and proposed changes to the current staffing allocations for school testing coordinators, school social workers, school psychologists, and school counselors, resource teachers for the gifted, assistant principals, and deans of students. APS expects the following deliverables for this project:

1. A detailed analysis of the current processes and procedures, alignment of current staffing allocations with organizational goals as well as industry trends and best practices.
2. Recommendations for optimization with a detailed implementation plan including costs for the proposed changes. The implementation plan should provide options for implementation in one year, over two years, and over three years.
3. A presentation of the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.
4. A final report documenting the outcomes of the project and any additional findings.

#### **I. Schedule/Milestones:**

The project is expected to begin in August 2023 and end in May 2024.

1. **Initiation:** Kick-off meeting with key stakeholders to define project scope, timeline, and budget, and to establish project governance and communication plans.
2. **Current state analysis:** Completion of the analysis of the current staffing allocation processes, alignment of current staffing allocations with organizational goals as well as industry trends and best practices. Review of staffing allocations in surrounding jurisdictions and comparison with current APS staffing allocations.
3. **Design Team Development and High-Level Recommendations Memo:** Produce a memo to the division in December 2023 that includes high-level recommendations for SPED, EL, and Other Positions. The high-level recommendations would categorize changes that could potentially be implemented for FY25 budget and those that will require the Design Team's input and could be implemented in later budget cycles. Select members of the Design Team and plan Design Team sessions agenda.
4. **January Design Team Sessions:** Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles.

5. **February Design Team Sessions:** Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles.
6. **March Design Team Sessions:** Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles.
7. **April Design Team Sessions and Recommendations Presentations:** Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles. Present final Design Team recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.
8. Closure: Final project report documenting the outcomes of the project and any additional findings, and closeout of the project.

**End of Scope of Work**



**PRICING SCHEDULE (REVISED AMENDMENT NO.1)**

No.	Description	Total Price
1	Review of Specific Staffing Allocations (also known as Planning Factors)  (Total Price includes all travel costs)	<b>\$366,835.00</b>

**Proposed Milestone Payment Plan**

<u>No.</u>	<u>Major Milestone Name/ Description</u>	<u>Deliverable Date</u>	<u>Major Milestone Fee</u>
1	<b>Initiation:</b> Kick-off meeting with key stakeholders to define project scope, timeline, and budget, and to establish project governance and communication plans.	By end of Week 3	\$20,620
2	<b>Current State Analysis:</b> Completion of the analysis of the current staffing allocation processes, alignment of current staffing allocations with organizational goals as well as industry trends and best practices. Review of staffing allocations in surrounding jurisdictions and comparison with current APS staffing allocations.	By end of Month 3	\$144,595
3	<b>Design Team Development and High-Level Recommendations Memo:</b> Produce a memo to the division in December 2023 that includes high-level recommendations for SPED, EL, and Other Positions. The high-level recommendations would categorize changes that could potentially be implemented for FY25 budget and those that will require the Design Team's input and could be implemented in later budget cycles. Select members of the Design Team and plan Design Team sessions agenda and work agenda.	December 20, 2023	\$46,240
4	<b>January Design Team Sessions:</b> Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles.	January 31, 2024	\$30,000
5	<b>February Design Team Sessions:</b> Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles.	February 28, 2024	\$30,000
6	<b>March Design Team Sessions:</b> Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles.	March 29, 2024	\$30,000
7	<b>April Design Team Sessions and Recommendations Presentations:</b> Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles. Present final Design Team recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.	April 30, 2024	\$45,000
8	<b>Closure:</b> Final project report documenting the outcomes of the project and any additional findings, and closeout of the project.	May 31, 2024	\$20,380
	<b>Total</b>		<b>\$366,835.00</b>

**End of Pricing Schedule**

## APPENDIX TO SCOPE OF WORK (REVISED AMENDMENT NO.1)

### **Background:**

Arlington Public Schools (APS) has identified a need for a comprehensive review and analysis of its current methodologies and systems used to allocate staffing for students with disabilities, English learner students, and to assess equity in the allocation of resources across all schools. The objective of this review is to evaluate the effectiveness of the current staffing allocation practices and identify any obstacles or bottlenecks hindering their effectiveness. The review will consider the alignment between the current staffing allocation practices and the overall goals and priorities of the School Board, including its Strategic Plan, Priorities, budget direction, as well as the Virginia Standards of Quality. The review will also examine staffing allocations for students with disabilities and English learner students in surrounding districts, assess best practices and emerging trends and innovations, and develop recommendations for optimizing the current staffing allocation processes, procedures, and methodologies. The review will propose new planning factors for students with disabilities, changes in planning factors to ensure greater equity in the allocation of staffing to schools, and optimization of staffing allocation processes for English learner students. The review will provide three implementation options for each recommendation and develop a detailed implementation plan, including training programs and supporting documentation and reference materials (**Optional**). The review will also provide an ongoing evaluation of the impact of the new or optimized processes and allocations, including regular monitoring and reporting on the outcomes. Key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments, will receive a presentation of the findings and recommendations.

### **B. General Information:**

The Scope of Work (Work) outlines the objectives, tasks, and deliverables of the project Review of Specific Staffing Allocations (also known as Planning Factors). The project aims to identify areas for improvement in the current staffing allocations and provide recommendations for optimization. The project will be completed within the estimated timeline and Contract Price, with a focus on quality control to ensure the deliverables meet the required standards.

### **C. Objective:**

APS is seeking to perform a comprehensive review of specific staffing allocations, called planning factors, provided to schools for a variety of positions. Currently, these planning factors provide staffing allocations to schools primarily based on enrollment (e.g., pre K-12 general education, special education, and English Learner) although other data may also be used (e.g., free & reduced lunch percentage). This project aims to identify any inefficiencies, limitations, or areas for improvement, and provide recommendations for optimization. This comprehensive review seeks to understand what best practices are and how surrounding jurisdictions provide staffing to schools in the specific areas outlined in the Scope section below. The review should also consider the inclusion of factors other than enrollment for calculating how staffing should be allocated including, but not limited to:

5. School status (such as Title I or Title I eligible)
6. Size of the Economically Disadvantaged student reporting group population (numerically rather than on school status)
7. Percentage of students in a school with additional needs based on current and historical data overall (multiple reporting groups)
8. Test scores

### **H. Special Education Planning Factors:**

15. Review and analyze the current methodologies and systems used to allocate staffing for students with disabilities in all categories, including identification of any obstacles or bottlenecks that may be hindering their effectiveness.
16. Assess the alignment between the current staffing allocation practices and the overall goals and priorities of Arlington Public Schools including the Strategic Plan, the School Board's Priorities, and the School Board's budget direction.
17. Assess the alignment between the current staffing allocation practices and the Virginia Standards of Quality.

18. Examine staffing allocations for students with disabilities in surrounding districts. Surrounding districts include Alexandria, Falls Church, Fairfax, Loudoun, and Prince William school systems.
19. Assess best practices and emerging trends and innovations in allocating staffing for students with disabilities, to include a review of recommended staffing allocations from national associations.
20. Review the proposal developed by the Office of Special Education (OSE) to change the planning factors for staffing allocations for students with disabilities.
21. Determine if proposed changes from OSE align with what surrounding jurisdictions are doing.
22. Determine if proposed changes from OSE align with best practices and/or emerging trends and innovations.
23. Determine if proposed changes from OSE align with the Virginia Standards of Quality.
24. Determine if factors other than enrollment, as outlined in the Objectives section, should be used to allocate staffing for students with disabilities.
25. Based on the results of the analysis and review, develop recommendations, **through a Design Team process**, for optimizing the current staffing allocation processes, procedures, and methodologies.
26. Propose new planning factors for students with disabilities that consider best practices, emerging trends, staffing allocations in surrounding jurisdictions, the Virginia Standards of Quality, and any other factors deemed relevant under Section A.8 above.
27. Provide three options for each implementation of proposed new planning factors:
  - a. Option 1 – full implementation in one budget cycle
  - b. Option 2 – phase in implementation over 2 years
  - c. Option 3 – phase in implementation over 3 years
28. Present the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.
- ~~29. Develop a detailed implementation plan for the proposed changes, including training programs and supporting documentation and reference materials. (Optional)~~
- ~~30. Provide an ongoing evaluation of the impact of the new or optimized processes and allocations, including regular monitoring and reporting on the outcomes.~~

#### **I. Equity Analysis**

13. Assess the alignment between the current staffing allocation practices and the overall goals and priorities of Arlington Public Schools including the Strategic Plan, the School Board's Priorities, and the School Board's budget direction, with a particular focus on how allocating resources equitably can assist in achieving the goal of eliminating opportunity gaps so all students achieve excellence.
14. Review work done in Fall 2022 by Equity Journey Partners and Allovue around planning factors and equity.
15. Examine surrounding districts to determine how they allocate staffing to ensure equity.

16. Assess best practices and emerging trends and innovations in staffing allocations to ensure equity across schools, to include a review of recommended staffing allocations from national associations.
17. Assess the alignment between the current staffing allocation practices and the Virginia Standards of Quality.
18. Determine if factors other than enrollment, as outlined in the Objectives section, should be used to allocate staffing to ensure equity across schools.
19. Based on the results of the analysis and review, develop recommendations for optimizing the current staffing allocation processes, procedures, and methodologies.
20. Propose new planning factors and/or changes in planning factors to ensure greater equity in the allocation of staffing to schools, especially for economically disadvantaged students, that consider best practices, emerging trends, staffing allocations in surrounding jurisdictions, the Virginia Standards of Quality, and any other factors deemed relevant under Section B.5 above.
21. Provide three options for each implementation of proposed new planning factors:
  - a. Option 1 – full implementation in one budget cycle
  - b. Option 2 – phase in implementation over 2 years
  - c. Option 3 – phase in implementation over 3 years
22. Present the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.
23. Develop a detailed implementation plan for the proposed changes, including training programs and supporting documentation and reference materials. (Optional)
24. Provide an ongoing evaluation of the impact of the new or optimized processes and allocations, including regular monitoring and reporting on the outcomes.

**J. English Learner Planning Factors**

12. Review and analyze the current methodologies and systems used to allocate staffing for English learner students, including identification of any obstacles or bottlenecks that may be hindering their effectiveness.
13. Assess the alignment between the current staffing allocation practices and the overall goals and priorities of Arlington Public Schools including the Strategic Plan, the School Board's Priorities, and the School Board's budget direction.
14. Assess the alignment between the current staffing allocation practices and the Virginia Standards of Quality.
15. Examine staffing allocations for English learner students in surrounding jurisdictions.
16. Assess best practices and emerging trends and innovations in allocating staffing for English learner students, to include a review of recommended staffing allocations from national associations.
17. Review the Department of Justice Settlement Agreement regarding current staffing allocations for English learner students.

18. Determine if factors other than enrollment, as outlined in the Objectives section, should be used to allocate staffing for English learner students.
19. Based on the results of the analysis and review, develop recommendations, **through a Design Team process**, for optimizing the current staffing allocation processes, procedures, and methodologies.
20. Propose new planning factors for English learner students that consider best practices, emerging trends, staffing allocations in surrounding jurisdictions, the Department of Justice Settlement Agreement, the Virginia Standards of Quality and any other factors deemed relevant under Section C.7 above.
21. Provide three options for each implementation of proposed new planning factors:
  - a. Option 1 – full implementation in one budget cycle
  - b. Option 2 – phase in implementation over 2 years
  - c. Option 3 – phase in implementation over 3 years
22. Present the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.
23. ~~Develop a detailed implementation plan for the proposed changes, including training programs and supporting documentation and reference materials. (Optional)~~
24. ~~Provide an ongoing evaluation of the impact of the new or optimized processes and allocations, including regular monitoring and reporting on the outcomes.~~

#### **K. Other Planning Factors**

11. Review and analyze the current methodologies and systems used to allocate staffing for the positions listed below, including identification of any obstacles or bottlenecks that may be hindering their effectiveness.
  - a. School testing coordinator
  - b. School social worker
  - c. School psychologist
  - d. School counselor
  - e. Resource teacher for the gifted
  - f. Assistant principal
  - g. Dean of students (secondary level only)
  - h. Minimum and maximum class sizes for grades K-5, 6-8, and 9-12
12. Assess the alignment between the current staffing allocation practices and the overall goals and priorities of Arlington Public Schools including the Strategic Plan, the School Board's Priorities, and the School Board's budget direction.

13. Examine staffing allocations for each of the listed positions in surrounding jurisdictions.
14. Assess best practices and emerging trends and innovations in allocating staffing for each of the above-listed positions, to include a review of recommended staffing allocations from national associations.
15. Assess the alignment between the current staffing allocation practices and the Virginia Standards of Quality.
16. Determine if factors other than enrollment, as outlined in the Objectives section, should be used to allocate staffing for the above-listed positions.
17. Based on the results of the analysis and review, develop recommendations, **through a Design Team process**, for optimizing the current staffing allocation processes, procedures, and methodologies.
18. Propose new planning factors for the above-listed positions that consider best practices, emerging trends, staffing allocations in surrounding jurisdictions, the Virginia Standards of Quality, and any other factors deemed relevant under Section D.6 above.
19. Provide three options for each implementation of proposed new planning factors for each of the above-listed positions.
  - a. Option 1 – full implementation in one budget cycle
  - b. Option 2 – phase in implementation over 2 years
  - c. Option 3 – phase in implementation over 3 years
20. Present the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.
- ~~21. Develop a detailed implementation plan for the proposed changes, including training programs and supporting documentation and reference materials. (Optional)~~**

**J. Deliverables:**

At the end of the review, Arlington Public Schools expects to have recommendations for changes to the current planning factors that can be incorporated into the FY 2025 budget and beyond. As outlined in the Scope, the recommendations for changes will encompass proposed changes to the staffing allocations, processes, and procedures for students with disabilities, new or revised staffing allocations that provide greater equity across schools, and proposed changes to the current staffing allocations for school testing coordinators, school social workers, school psychologists, and school counselors, resource teachers for the gifted, assistant principals, and deans of students. APS expects the following deliverables for this project:

5. A detailed analysis of the current processes and procedures, alignment of current staffing allocations with organizational goals as well as industry trends and best practices.
6. Recommendations for optimization with a detailed implementation plan including costs for the proposed changes. The implementation plan should provide options for implementation in one year, over two years, and over three years.
7. A presentation of the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.
8. A final report documenting the outcomes of the project and any additional findings.

- ~~9. An evaluation of the effectiveness of the new or optimized staffing allocation processes and procedures after a specified period.~~
- ~~10. Optional: APS, at its sole discretion, has the right, but is under no obligation, to exercise this right to utilize this deliverable. APS will make a determination on the execution of this Deliverable by the end of month sixth.~~
  - ~~○ A training program for relevant staff members on the new or optimized staffing allocation processes and procedures.~~
  - ~~○ Supporting documentation and reference materials for the new or optimized staffing allocation processes and procedures.~~

**K. Schedule/Milestones:**

The project is expected to begin in August 2023 and end in May 2024.

9. **Initiation:** Kick-off meeting with key stakeholders to define project scope, timeline, and budget, and to establish project governance and communication plans.
10. **Current state analysis:** Completion of the analysis of the current staffing allocation processes, alignment of current staffing allocations with organizational goals as well as industry trends and best practices. Review of staffing allocations in surrounding jurisdictions and comparison with current APS staffing allocations.
11. **Design Team Development and High-Level Recommendations Memo:** Produce a memo to the division in December 2023 that includes high-level recommendations for SPED, EL, and Other Positions. The high-level recommendations would categorize changes that could potentially be implemented for FY25 budget and those that will require the Design Team's input and could be implemented in later budget cycles. Select members of the Design Team and plan Design Team sessions agenda.
12. **January Design Team Sessions:** Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles.
13. **February Design Team Sessions:** Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles.
14. **March Design Team Sessions:** Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles.
15. **April Design Team Sessions and Recommendations Presentations:** Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles. Present final Design Team recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.
16. **Closure:** Final project report documenting the outcomes of the project and any additional findings, and closeout of the project.
- ~~3. Recommendation development: Development of recommendations for optimizing the current staffing allocation processes, procedures, and methodologies.~~
- ~~4. Recommendation presentation: Presentation of the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.~~
- ~~5. Implementation planning: Development of a detailed implementation plan for the proposed changes.~~
- ~~6. Go-live: Launch of the new or optimized staffing allocation processes and procedures.~~
- ~~7. Evaluation: Evaluation of the effectiveness of the new or optimized staffing allocation processes and procedures after a specified period of time.~~

~~8. Optional: APS, at its sole discretion, has the right, but is under no obligation, to exercise this right to utilize this deliverable. APS will make a determination on the execution of this Deliverable by the end of month sixth.~~

~~a. Training and documentation: Completion of training and preparation of supporting documentation and reference materials for the new or optimized staffing allocation processes and procedures.~~

End of Scope of Work



**APPENDIX TO PRICING SCHEDULE (REVISED AMENDMENT NO.1)**

No.	Description	Total Price
1	Review of Specific Staffing Allocations (also known as Planning Factors)  (Total Price includes all travel costs)	<del>\$320,215.00</del> <b>\$366,835.00</b>

**Proposed Milestone Payment Plan**

No.	Major Milestone Name/ Description	Deliverable Date	Major Milestone Fee
1	<b>Initiation:</b> Kick-off meeting with key stakeholders to define project scope, timeline, and budget, and to establish project governance and communication plans.	By end of Week 3	\$20,620
2	<b>Current State Analysis:</b> Completion of the analysis of the current staffing allocation processes, alignment of current staffing allocations with organizational goals as well as industry trends and best practices. Review of staffing allocations in surrounding jurisdictions and comparison with current APS staffing allocations.	By end of Month 3	\$144,595
3	<b>Design Team Development and High-Level Recommendations Memo:</b> Produce a memo to the division in December 2023 that includes high-level recommendations for SPED, EL, and Other Positions. The high-level recommendations would categorize changes that could potentially be implemented for FY25 budget and those that will require the Design Team's input and could be implemented in later budget cycles. Select members of the Design Team and plan Design Team sessions agenda and work agenda. <del><b>Recommendation Development: Development of recommendations for optimizing the current staffing allocation processes, procedures, and methodologies</b></del>	December 20, 2023 <del>By end of Month 3.5</del>	\$46,240 <del>\$48,620</del>
4	<b>January Design Team Sessions:</b> Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles. <del><b>Recommendation Presentation: Presentation of the findings and recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.</b></del>	January 31, 2024 <del>By December 18, 2023</del>	\$30,000 <del>\$16,740</del>
5	<b>February Design Team Sessions:</b> Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles. <del><b>Implementation Planning: Development of a detailed implementation plan for the proposed changes.</b></del>	February 28, 2024 <del>By end of Month 4</del>	\$30,000 <del>\$33,300</del>
6	<b>March Design Team Sessions:</b> Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles. <del><b>Go-live: Launch of the new or optimized staffing allocation processes and procedures.</b></del>	March 29, 2024 <del>By end of Month 8</del>	\$30,000 <del>\$7,920</del>
7	<b>April Design Team Sessions and Recommendations Presentations:</b> Facilitate working sessions with Design Team to co-develop planning factor changes for FY26 and forward budget cycles. Present final Design Team recommendations to key stakeholders, including the School Board, the APS Executive Leadership Team, and relevant departments.	April 30, 2024 <del>By end of Month 9</del>	\$45,000 <del>\$23,040</del>

	<del>Evaluation: Evaluation of the effectiveness of the new or optimized staffing allocation processes and procedures after a specified period of time.</del>		
8	<b>Closure:</b> Final project report documenting the outcomes of the project and any additional findings, and closeout of the project.	May 31, 2024 <b>By end of month 10</b>	\$20,380 <b>\$25,380</b>
	<b>Total</b>		<b>\$366,835.00</b> <b>\$320,215.00</b>

Optional: refer to Section I 9 of Scope of Work

<u>No.</u>	<u>Major Milestone Name/Description</u>	<u>Deliverable Date</u>	<u>Major Milestone Fee</u>
1	<del>Training and Documentation: Completion of training and preparation of supporting documentation and reference materials for the new or optimized staffing allocation processes and procedures.</del>	<b>By end of Month 6</b>	<b>\$46,620</b>

End of Pricing Schedule