

Williamsville Central School District

Request for Proposal

Consultant Services for the Review and Analysis of Employee Positions

Date of Issue: March 20, 2024

Proposal Due Date: April 18, 2024

Request for Proposal (RFP) Summary

The information necessary to complete this RFP which is for the review and analysis of employee positions is defined below:

1. **Guidelines to Complete the RFP**
2. **District Overview**
3. **Scope of Services**
4. **Required Study Deliverables**
5. **Requirements for Professional Credentials and Experience**
6. **Request for References**
7. **Proposal of Cost/Fees**
8. **Evaluation Criteria**
9. **Proposal Submission Requirements**

1. Guidelines to Complete RFP

All completed proposals for the Review and Analysis of Employee positions **MUST** be returned to the Williamsville Central School District Business Office **NO LATER than 2:00 P.M., Thursday, April 18, 2024.**

The District requests that each proposal include a summary page that lists all costs/fees with a statement that identifies any items that would not be included within the cost/fee proposal. The format for this summary page is located in the Appendix.

All RFP's submitted **up to the deadline date** will be reviewed by the Williamsville Central School District. Each RFP will be evaluated based on the dimensions provided in the Evaluation Criteria section of the RFP. Items that will be considered are **Credentials, Experience, Methodologies, References and Fee Schedules.**

Appointment of a consultant for the review and analysis of employee positions is tentatively scheduled to occur at the June 2024, Board of Education meeting. The appointment will be effective upon receipt of the execution of the contracts by both the consultant and the school district. The term of the agreement will be stated in the contract.

If you have any questions regarding this RFP, please contact Thomas Maturski, Interim Assistant Superintendent for Finance and Management Services at 716-626-8012.

The District reserves the right to award services in total to one consultant or to award individual services to separate consultants based on the proposal or proposals that best meet District needs.

2. District Overview

The Williamsville Central School District is located in Erie County in the State of New York. The school district is governed by the education law of the State of New York and all rules and regulations put forth by the New York State Board of Regents. The New York State Board of Regents provides for a local School Board of Education to govern the actions and programs of each school district in New York State.

The Williamsville Central School District (WCSD) is the largest Central School District (CSD) in Erie County. For the 2023-2024 school year the district has a total enrollment of 9,750 students. The district contains thirteen school buildings and encompasses forty square miles, which provides education to portions of the towns of Amherst, Clarence, and Cheektowaga. The 2023-2024 school year budget for the Williamsville CSD is \$223,388,003. The Williamsville Central School District is recognized as one of the leading public school districts in Western New York.

3. Scope of Consultant Services for the Review and Analysis of Employee Positions included in the Williamsville Association of Educated Related Personnel unit and those Employees classified as Confidential

The Williamsville School District in this proposal is specifically requesting the review of district office and school office support positions.

- District office human resource department
- District office exceptional education and student services department
- District office instruction department
- District office business department
- District office technology department
- School offices

Number of positions to be reviewed in this study will range between 95-105 positions.

Major tasks completed by department staff positions:

Human Resources

Employee certification monitoring/review, employee onboarding, employee benefit processing, payroll processing, position/job postings, candidate qualification review, health benefit management/processing, Federal and State payroll reporting, employee discipline, labor unit negotiation, labor unit meetings, Federal and State legal compliance, and employee customer service.

Exceptional Education and Student Services

Processing all committee for Special Education meeting information for each student, instructional programming for special education students, student private placement and BOCES placements, residency review, special education legal compliance, student school enrollment, student course enrollment, health services, school nurse supervision, State reporting, Federal grant management, overseeing school counseling, special education staffing, implementation of student wellness programming,

Instruction

Implementation of district instructional programming, administrative supervision, teacher and staff supervision, school instructional staffing, Federal grant management, Federal and State reporting, staff development planning and implementation, and assistance in teacher staffing recruitment/hiring.

Business

Purchasing, accounting, accounts payable, claim form processing, 1099 processing, financial reporting, accounts receivable invoicing, capital project reporting, audits, budget preparation, and budget management.

Technology

Infrastructure management, server maintenance, internet monitoring, cyber security, computer/chromebook acquisition and management, network maintenance, software acquisition, technology support for schools and departments, email support, WITS system maintenance, and management of user access.

School Offices

Parent communication, student enrollment, student attendance, teacher communications, purchase order input, incoming/outgoing mail, notices to parents, and duties that support of school administration.

Review, Analysis, Objectives:

- Identify the actual duties performed by office staff
- Identify duties that may be completed by staff that should not be assigned to them
- Report on whether the staff who are assigned duties have the correct skills to complete the tasks
- Report on whether staff have sufficient daily work or if they have too much daily work
- Report on if current work assigned to staff is reasonable for their job classification
- Report on whether job classifications should be adjusted to better match the assignment of work
- Report on efficiency of work assignment and completion for each department
- Report recommendations on changes in staff numbers and the experience level of positions
- Recommend changes to job titles
- Provide analysis on position salary levels to other local school districts
- Provide detailed criteria on the measures to be used for gauging staff efficiency
- Statement of determination on whether current employees who are designated as “confidential” meet the definition for this category. The recommendation should state if any employees categorized as confidential should have their classification changed back to a member of the Williamsville Association of Education Related Personnel (W.A.E.R.P.) unit.

Details of Specific Work Plan of Staff in Departments

- Creation of a work plan for your efficiency study that is reviewed and approved by the District
- Meet with department assistant superintendent, supervisor, or principal to review their staffing
- Note unfilled positions
- Interview individual staff to obtain their work responsibilities
- Complete sample observations of staff as they complete their work tasks
- Record whether supervisor/principal assigned work duties are being performed efficiently
- Observe if staff communicate effectively with supervisors and others
- Note whether staff have the appropriate computer skills and other resources to complete their work
- Note whether staff appear to manage their work tasks efficiently or are there issues that result in problems that require assistance of others
- Record complaints voiced by staff on their work responsibilities
- Provide a detailed plan on how information will be obtained on employee positions

Review Human Resource Job Titles and Duties

- Cross-reference the job titles reviewed in departments/schools to what is written in the human resource job description
- Record differences in actual work responsibilities to the human resource job descriptions.
- Determine if job qualifications match the person’s current job duties

Onsite versus Remote Work

- The District requires that the firm detail what work plan items/tasks they plan to complete onsite versus items they will do remotely. All virtual meetings must be identified. The District and the appointed firm will review the onsite versus remote work plan to agree on how work will be completed.
- The District requests that there will be actual onsite review of mutually identified positions. An example is that most district office positions will require onsite review. A sampling of school office positions will require onsite review.
- Upon an initial review and analysis of department and school office positions it may be determined through District and consultant conversations that additional onsite position review is

needed.

4. Required Study Deliverables

1. Detailed report by department and school regarding the current staffing positions, unfilled staffing positions, school district position name, and cross-reference to civil service position name.
2. Detailed report by department and school stating by position the duties performed by each staff member.
3. Detailed report by department and school stating whether the duties performed by staff are in alignment to their titled position and civil service position.
4. Detailed report by department and school stating the efficiency of work completed by each person/position.
5. Recommendations on position consolidations with advanced job titles which include supporting measurables for why an advanced position will be able to complete more work than the current staffing model.
6. Provide updated job descriptions pertinent to Williamsville CSD with cross-referencing to civil service classifications.
7. Report should include the estimated financial impact and cost savings to the recommendations in your proposals.
8. Each firm should provide a timeline that includes estimated completion dates for stages of their work with estimated dates for submission of their draft reports to the District.
9. This project's timeline shall begin on July 1, 2024 and requires a final report to be provided to the District on December 1, 2024.

5. Professional Credentials & Experience

All proposals must include the following information in the order requested:

1. Please submit a brief description and history of your experience related to completing a staff efficiency review in the public sector. Please highlight and public school district experience.
2. Please list the members of your firm who will be assigned to the School District, along with their professional credentials and resumes. (The District reserves the right to request a change in professionals assigned to the district over the term of an appointment).
3. Please list your firm's professional memberships.
4. Please describe your firm's experience in the following areas:
 - Federal labor law affecting public schools
 - New York State labor law affecting public schools
 - Proven experience in preparing staff efficiency reports
 - Proven experience in preparing staff efficiency reports for a public school district
 - Proven experience regarding staffing recommendations
 - Experience in providing guidance on implementation of staffing changes
 - Experience in providing estimated cost savings from your recommendations
 - If a firm does not have specific experience in the stated areas, they may provide additional information as to why they are qualified to complete this study

6. Request for References

Please provide a current listing of school districts, municipalities and other public entities your firm has worked in to complete a staffing efficiency study or similar labor review study within the last five years.

7. Proposal of Costs/Fees Structure

1. The District requests that each proposal provide a **lump-sum cost inclusive of all fees with the exception of travel expenses**. All documented travel expenses will be reimbursed per Williamsville Central School District travel policy and procedures. (Appendix A).
2. Although the District requests a lump-sum cost proposal, it is also requiring a statement from the consultant which defines whether there are any fees that the District would be billed that are not part of the lump-sum fee.

8. Evaluation Criteria

Weighted Criteria Evaluation

Weighted Criteria Evaluation will be used to rate service requests listed on the next page. The point system to be used is listed below. Points will be assigned and tabulated for each proposal. Every proposal will then be reviewed for the services that they will provide to the District. Each proposal will be reviewed to determine if it meets the mandatory criteria; if so it will proceed to the second review level. The second review level will rank the proposals by their total point amounts and these proposals will be reevaluated against the needs that the District requires for completing a staff review and analysis study. The District will select the top proposals for a final comparison review and may contact each consultant ask follow-up questions concerning their RFP. The District may request individual meetings with the top finalists to allow them to clarify areas of their RFP. Based on the review and evaluation process discussed in this RFP, a decision will be made concerning awards of consultant services.

(0-8) Points	Limited or does not meet district requests.
(9-11) Points	Extensive experience in one area but may not or has not demonstrated experience in all areas of request. Service proposal meets district request.
(12-15) Points	Exceptional experience and support for requested service. Service proposal exceeds district request.

Services Subject to Weighted Evaluation Criteria

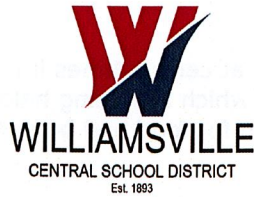
(This section is provided for informational purposes only)

Service Description	Points (0-8)	Points (9-11)	Points (11-15)
Quality of work plan			
Plan for review of staff work and experience in determining appropriate assignment of duties to a position			
Plan for determining work efficiency by position			
Plan to determine if higher level position can result in position consolidation			
Familiarity with school district and civil service job titles			
Experience in providing salary level analysis			
Quality of sample reports related to this study			
Quality of assigned personnel to this study			
Acceptance of district onsite versus remote work requirement			
Ability to meet the study's deliverables			
Proven record of providing legitimate recommendations within the report			
Proven record on providing guidance suggestions concerning implementation methods for staff position consolidations and/or changes			
References			
Proposal cost and fee structure			
Firm intangibles related to improving the final report			

9. Proposal Submission Requirements:

Proposals must be received by **2:00 P.M., Thursday, April 18, 2024.**

1. The District requests four paper copies of your firm's proposal plus an electronic file that may be sent via email.
2. A firm's response letter should state whether their proposal meets all of the RFP requirements or that they are noting a specific area or item that would need to be discussed with the District.
3. Please include a completed Description of Cost/Fees by Category summary page in your proposal. A signature is needed at the bottom of the Description of Cost/Fees by Category summary page.



Book	District Policies
Section	5000 Non-Instructional/Business Operations
Title	Reimbursement for Meals/Refreshments
Code	5323
Status	Active
Adopted	July 7, 2009
Last Reviewed	November 10, 2022

5323 Reimbursement for Meals/Refreshments

Travel Outside of District/Emergency Meetings

District officials and employees are entitled to reimbursement for necessary expenses incurred in the performance of their official duties. However, it is the position of the New York State Comptroller's Office that meals of public officers and employees generally should not be reimbursed or paid by the municipal entity unless the officer or employee is traveling outside their regular work area on official business for an extended period of time, or where events prevent them from taking off during mealtime for food consumption because of a pressing need to complete business. All requests for reimbursement must document who attended the meetings and how the meetings fit these conditions.

Rules Relating To All District Travel

- a) Meal expenses for overnight travel will only be reimbursed when accompanied by original receipts. Maximum allowable meal costs will be established by the Board of Education at the Annual Reorganization Meeting. The meal allowance includes tips. The District will not provide reimbursement for alcoholic beverage purchases.
- b) Purchase orders or purchase card must be used when making reservations for airline tickets or car rentals when possible. When traveling by air, the District employee or Board member shall use the lowest commercial airline offering service to the travel destination.
- c) A reimbursement request will be processed only when it is submitted on the District's conference request form and includes the required administrative approval for the claimed expenditures.
- d) New York State sales taxes for lodging and meals cannot be reimbursed. A Sales Tax-Exempt Form should be obtained from the Business Office prior to your travel date so that these charges will not be added to your hotel bill.
- e) If a conference includes meals as part of the registration fee, the District will not reimburse a person for meal expenses originating from their choice not to dine at the conference planned meal.
- f) The amount of reimbursement for meals during the first and last day of travel will depend on the duration of the trip. Breakfast is not eligible for reimbursement on the first day of the trip unless travel begins before 6 a.m. Dinner is not eligible for reimbursement on the last day of travel unless travel ends after 6 p.m. Documentation for this type of meal expense must include a receipt with the time and date of the expense. In addition, the meal cannot occur within fifty miles of the District boundaries.
- g) Travel over three hundred (300) miles per round trip must be by public carrier unless it can be demonstrated that automobile travel will be more economical with respect to the following: time involved, the cost of lodging and meals, the existing mileage allowance, and accessibility of the destination by public carrier.

Staff/Board Meetings and District Events

However, the Board of Education recognizes that at certain times it may be appropriate to provide meals and/or refreshments at District meetings and/or events which are being held for an educational purpose. Prior approval of the Superintendent/designee must be obtained for food and beverages provided at meetings or activities which will be charged to the District.

Any such expenditures must be appropriately documented with an itemized receipt and information showing the date and purpose of the meeting, food served, who attended the meetings and why the attendees needed food and/or refreshments to conduct District business. These requirements must be met for meals/refreshments provided by the school lunch fund or local vendors, charged to District credit cards and/or reimbursed to a District official.

In no case will the costs for meals exceed the current Federal per diem meal rates for the geographic area.

Cross References [6161 - Conference/Travel Expense Reimbursement](#)