

**PROPOSAL FOR BUSINESS and OPERATIONS  
REVIEW  
For the Rainier School District**

Qualified consultants and team members under the direction of Angie Peterman, Oregon Association of School Business Officials (OASBO) will conduct a business and operations review to include the following areas:

1. Finance, Accounting, Purchasing and Reporting
2. Administration and Communication
3. Human Resources
4. Food Service
5. Risk Management

Other optional areas to consider for inclusion:

1. Maintenance and Facilities
2. Transportation

**I. SCOPE OF WORK**

- A. Analyze and review current job descriptions and the organizational structure including job functions, job assignments and assessment of the level of job skills needed to perform the position responsibilities. Consultants will provide recommended changes that become apparent during the review.
- B. Provide for in-depth interviews with key personnel within the areas of Finance and Accounting, Human Resources, Food Service, Risk Management and other School District staff as deemed appropriate and agreed to. Although this review is not intended to encompass Human Resources some discussion with staff in this department may be beneficial to the overall review. Due to the current COVID restrictions the majority, if not all, interviews will be conducted virtually.
- C. Provide a comprehensive review of the operations areas identified above. Services will include:
  1. Review the Business Office accounting and financial reporting process including payroll, purchasing and accounts payable.
  2. Review of human resource department and interactions with business office and payroll staffing.

3. Review the flow of the business-related services between the building level and the central office and provide recommendations for improving efficiencies.
  4. Review risk management and food service programs in comparison to established standards and their interaction with the business office.
  5. Review use of current business office technology and data processing applications to provide recommendations for enhancing the use of technology.
  6. Evaluate key personnel related processes with emphasis on the recruitment, interviewing, entrance/exit processing, staff assessment; and employee complaint/grievance resolution
- D. Collect and analyze School District statistical data:
1. Student enrollment – past, present and projected
  2. Budget – present and projected
  3. Present organizational chart(s) and human resource plan
  4. Business offices policies and procedures
  5. Board Policies
  6. Copy of School District strategic plan
- E. Provide an exit conference prior to leaving the District. The interview will identify areas of concern, items that may require additional information and district best practices.
- F. A draft of the written report will be delivered to the district for review and comment prior to the final report being issued. District personnel will be allowed time to respond to the report's findings, the review team leader will review comments and determine if additional work is necessary.
- G. Once all concerns have been addressed, the final report will be delivered, containing the following:
1. Best practices already used within the district.
  2. Recommendations for additional review and/or suggested alternative practices.
- II. THE DISTRICT WILL PROVIDE:**
- A. Completion of self-evaluation document.
  - B. Current job descriptions for all staff members.
  - C. A current organizational chart and human resources plan for all staff.
  - D. Current Board Policies
  - E. Current Budget

- F. Current Labor Contracts and Agreements
- G. Prior 3 years Audit Reports & Management Letters
- H. List of Current Employees by Position within review areas
- I. All Procedures Manuals and Handbooks
- J. Copies of any other pertinent documents that are required to complete the review but may not be specifically mentioned above, such as contractor agreements that may impact one or more areas under review.
- K. Staff and other individuals to be interviewed will be made available by appointment with the consultants. Such interviews will be developed with and at the convenience of the District.

### III. **TIMELINE**

The timeline for this project will be mutually agreed upon by the District and OASBO.

### IV. **COST OF PROPOSAL**

The total cost of the review as outlined in the Scope of Work is estimated range between \$6,000 and not more than \$8,000. OASBO will work with District staff and consultants to minimize costs to the extent possible.

### V. **CONSULTANT STAFF**

The OASBO designated review team leader will directly supervise all activities and consultant work assignments. All aspects of the review will be under the direction of the designated review team leader and Angie Peterman, Executive Director of OASBO.

### VI. **INDEMNIFICATION**

The School District agrees to defend and indemnify OASBO/OSBA and its consultants against wrongful acts, unless OASBO/OSBA or its consultants act with impropriety or illegality on the District's behalf, from all third parties claims arising from conducting this project.