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# Crete-Monee School District 201U

## Proposal for Strategy and Staffing Financial Audit Services






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**Prepared for:**

Crete-Monee School District 201U
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# About the Donovan Group

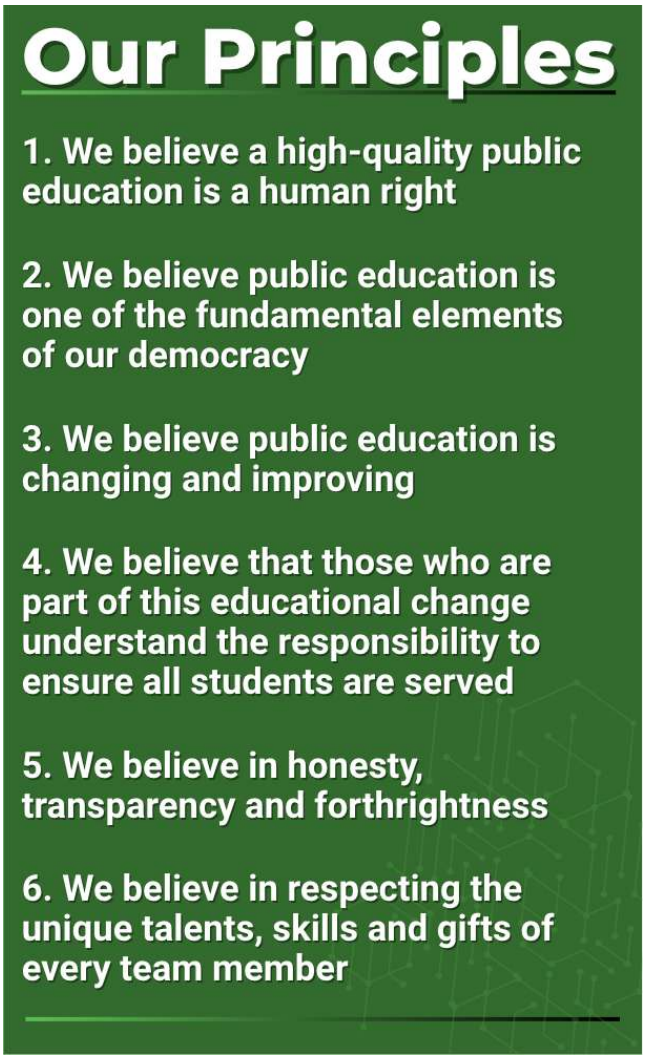
The Donovan Group is an award-winning communication, marketing, and public relations firm serving public schools nationwide. We specialize in K-12 education, helping district and school leaders strengthen connections with families, staff, students, and community members.

Our firm was founded in 2004 in Milwaukee, Wisconsin. For several years, we focused on serving the needs of public schools and districts in our home state.

Later, we took what we learned to expand to other states, starting with Iowa, Illinois, Pennsylvania, and Delaware. Today, we serve school and district leaders across the country. Along the way, we've added many truly talented and passionate education communication and school PR professionals to our team.

While the Donovan Group continues to grow, we remain true to our core principles of helping schools, school districts, and educational organizations tell their stories, engage their stakeholders, and deliver the best possible opportunities to their students.

**Our mission is grounded in the belief that exceptional communication builds *lasting* trust and is *essential* for schools to thrive.**




What makes the Donovan Group unique among public relations firms is that **we are a national firm that serves only K-12 public schools and districts**. Our team comprises individuals with experience in education who deeply understand the needs of superintendents and school board members.

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## Our Team

While the Donovan Group continues to grow, we remain true to our core principles of helping schools, school districts, and educational organizations tell their stories, engage their stakeholders, and deliver the best possible opportunities to their students.

Our team is comprised of six partners, a chief financial officer, a senior project manager, a human resources manager, a marketing manager, six department-level directors, ten communication strategists, three video specialists, a lead graphic designer, two social media specialists, a senior associate, and a project assistant.








Each year, our team comes together in Milwaukee for the Donovan Group All-Team Summit—an energizing gathering dedicated to learning, connection, and growth. Team members from across the country participate in strategy sessions, creative workshops, collaborative planning, and informal networking, all designed to strengthen how we support our school district partners and each other.

The Summit is a cornerstone of our company culture, offering meaningful space for professional learning, team building, and organizational development. Most importantly, it reminds us of the power of being in the same room: sharing ideas, solving challenges, and celebrating the impactful work we do every day alongside public schools.

**View Team Bios on Our Website**

## Dr. Lori M. Mueller, Donovan Group Partner

Dr. Lori M. Mueller will serve as the primary point of contact and lead facilitator for this engagement. As a former superintendent and director of curriculum and instruction, she brings direct experience with district budgeting, staffing, multi-tiered systems of support (MTSS), professional learning, and continuous improvement.

Dr. Mueller also brings an established understanding of Crete-Monee School District 201U. Having facilitated its strategic planning process and supported its superintendent search process, she understands the district's priorities and the importance of connecting financial decisions to the commitments made to students, staff, and the community. That familiarity provides a foundation for asking informed questions while testing conclusions against current evidence.

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## Opportunity for Our Partnership

The Donovan Group is grateful for the opportunity to propose financial and staffing audit services for Crete-Monee School District 201U. The district anticipates a deficit budget and needs a clear understanding of how its investments in improvement strategies and staffing contribute to student outcomes, operational effectiveness, and long-term financial stability.

Budget decisions require more than identifying expenses that can be reduced. Leaders need to understand why investments were made, whether they have been implemented as intended, whom they serve, and what would happen if they were adjusted. Our process will connect that understanding to practical budget implications.

## Goal

**The ultimate goal is to provide administration and the Board of Education with credible findings and actionable options to address the anticipated deficit and establish a balanced, sustainable budget. An essential companion goal is to protect the student experience and preserve high-leverage strategies that demonstrate strong educational value relative to their cost.**

The Donovan Group will facilitate an organizational and educational strategies review, analyze district-provided financial and staffing information, engage school community members, and develop decision-ready findings and recommendations. District finance and human resources leaders will validate source data, assumptions, and cost estimates.

For purposes of this proposal, “audit” means an advisory financial sustainability, continuous improvement, and staffing review. The engagement does not provide an independent financial statement audit, accounting assurance, forensic investigation, individual personnel evaluation, or legal or tax opinion. Questions requiring those services will be identified for the district’s appropriate professionals.

**Through This Partnership, the Donovan Group will support Crete-Monee School District 201U in its efforts to:**

- Map operational and continuous improvement investments to strategic plan priorities and assess impact, implementation, and cost.
- Evaluate staffing patterns against enrollment, student needs, schedules, service expectations, and comparable districts.
- Identify opportunities to maintain, strengthen, redesign, consolidate, scale, or discontinue investments.
- Present final findings and recommendations to administration and the Board by April 2027.

The review will assess options without predetermining a reduction target for any program or employee group. Recommendations will identify trade-offs, constraints, and evidence gaps so district leaders and board members can exercise informed judgment.

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## How It Works

### Project Onboarding and Leadership Alignment

We will confirm the financial problem to be solved, decision deadlines, strategic priorities, data access, school community member participation, and reporting expectations.

### A Dedicated Donovan Group Partner

Dr. Mueller will lead the work, conduct onsite fieldwork, and remain in regular contact with district leaders. Biweekly virtual project meetings and monthly executive briefs will provide updates on findings, data gaps, and emerging decisions.

### A Consistent Research Framework

The engagement will follow the Plan, Study, Do, Act model. Research and planning will occur during the review; implementation tools and monitoring measures will prepare the district to act following Board direction.

### Evidence and Student Experience

Major findings will be triangulated across records, performance data, observations, survey responses, and interviews or focus groups. Reports will distinguish verified conditions, perceptions, estimates, and questions that available evidence cannot resolve.

### Actionable Planning

Recommendations will identify ownership, timing, estimated net savings, student implications, implementation requirements, and measures of success. Administration and the Board will retain decision-making authority.

## Proposed Research Questions

- What is driving the deficit, and how much of it is recurring?
- Which operational and improvement strategies are reaching intended students and producing evidence of meaningful benefit?
- Which investments need stronger implementation before their effectiveness can be judged?
- How do staffing assignments and schedules align with enrollment, service needs, and strategic priorities?
- Which changes offer achievable recurring savings while preserving essential services and strong outcomes?

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# Proposed Scope of Services & Work

## Step One: Project Planning & Financial Baseline

During November, we will establish the factual foundation for the review and agree on a complete inventory of district and school operational and improvement strategies and staffing categories.

- Review the strategic plan, school improvement plans, current budget, year-to-date actuals, prior audited statements, fund balances, financial forecasts, and enrollment trends. Request five years of comparable financial and staffing information where available.
- Work with finance staff to reconcile the projected deficit to the current adopted budget and latest forecast. Separate recurring operations from one-time spending, restricted resources, transfers, and grant-supported commitments.
- Review payroll and benefits, vacancies, overtime, substitutes, contracted services, supplemental assignments, purchased programs, and other significant cost drivers. Identify known compensation changes, grant expirations, and spending commitments.

## Step Two: Operational & Continuous Improvement Strategy Inventory

We will inventory district-wide and school-based operational and achievement initiatives, including core instructional improvement, MTSS and intervention, instructional coaching, professional learning, student supports, and other strategies identified during onboarding. Every identified strategy will receive an inventory entry.

The review will connect performance data, school improvement plans, enrollment and participation trends, related budget items, federal grant use, and historical spending. Each strategy will be mapped to the district's strategic plan.

Historical narratives will document the need or event that prompted adoption, the intended theory of need or improvement, changes over time, and any previous evaluation. Missing historical records or outcome data will be reported explicitly.

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**Strategy Profiles and Alignment Mapping**

| Consideration | Information Included for Each Strategy |
|---|---|
| Purpose and alignment | Need addressed, intended outcomes, strategic priority, school improvement connection, adoption history, and accountable owner. |
| Implementation | Exploration, installation, initial implementation, or full implementation; duration, reach, dosage, fidelity, staff readiness, and barriers. |
| Students and outcomes | Students eligible and served, subgroup access, baseline and trend data, measures of success, attendance or engagement where relevant, and student and family experience. |
| Staff and full cost | Staff roles and FTE needed; allocated salary and benefits; materials, licenses, contracts, substitutes, professional learning, coaching, and ongoing training; annual and historical spending. |
| Funding and evidence | Funding source, federal grant purpose and expiration, restrictions, relevant Hattie research and other evidence, local results, cost per student, and confidence in conclusions. |

**Assessing Value Relative to Cost**
Educational return on investment will consider measurable student benefit relative to the full cost of delivery. Where data permit, we will calculate annual cost per participating student and cost per defined improvement outcome. Outcomes will be defined before comparisons; strategies with different purposes or populations will not be treated as interchangeable.

We will review relevant influences in John Hattie's Visible Learning research, documenting the research source, effect size where appropriate, population, and applicability to the district's strategy. Broad research averages are contextual evidence, not a monetary ROI calculation or a stand-alone reason to eliminate a program. Local results, implementation quality, student needs, and other credible research will inform each judgment.

Profiles will distinguish insufficient impact from insufficient evidence or weak implementation. Recommendations may include maintain, strengthen implementation, redesign, consolidate, scale, pilot with defined measures, or discontinue. Mandatory services and access obligations will be assessed before any reduction is proposed.

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## Step Three: Interviews, Focus Groups, & Surveys

Interviews, facilitated focus groups, and targeted surveys will explore how strategies operate in practice and provide respondents an opportunity to rate perceived effectiveness. A common SWOT protocol will identify strengths, weaknesses, opportunities, and threats for each strategy. Respondents will assess only strategies they know or have experienced; survey findings will be interpreted alongside participation and response limitations.

| Participants | Focus of Engagement |
|---|---|
| Superintendent and District Administration | Strategic priorities, history, implementation expectations, decision constraints, and district capacity. |
| Finance, Human Resources, and Department Leaders | Cost validation, funding conditions, staffing assignments, compensation, service requirements, and historical decisions. |
| Principals and Scheduling Teams | School improvement, master schedules, staffing deployment, class sizes, student access, and practical feasibility. |
| Educators, Instructional Coaches, and Interventionists/Specialists | Fidelity, dosage, professional learning, workload, duplication, student response, and staff roles needed for delivery. |
| Parents and Caregivers | Access, responsiveness, continuity, perceived benefit, unmet needs, and effects of potential changes. |
| Students | Learning experience, access to support and opportunities, belonging, benefit, and improvements they would value. |
| Board Members | Policy context, prior staffing decisions, community commitments, and information needed for governance decisions. |

Planning allowance: approximately 20–25 individual or small-group interviews, 10–12 focus groups of 6–10 participants, one targeted survey with audience-specific versions, and scheduled learning walks or service observations.

Participation will include varied department and school levels, programs, and student needs, with intentional access for historically underrepresented voices. The district will coordinate invitations, accommodations, interpretation, and student participation permissions. Findings will be reported as themes with small groups protected.

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### Step Four: Staffing & Compensation Review

We will examine how staffing decisions have developed and how current assignments align with enrollment, student needs, service requirements, and available resources. This review will include instructional, student support, administrative, and operational staffing, with depth prioritized by cost and potential budget impact.

- Review Board policies, staffing formulas, applicable agreements, job descriptions, service requirements, and policies affecting class size, workload, additional assignments, and compensation. Seek district counsel's interpretation when needed.
- Analyze five years of position-level staffing reports, authorized and filled FTE, vacancies, enrollment, salary and benefit costs, funding sources, and supplemental pay. Distinguish positions, FTE, and headcount.
- Review building master schedules, teacher assignments, course requests and enrollment, section sizes, planning time, intervention schedules, and student access to required and elective offerings.
- Examine caseloads and workload for special education, multilingual services, counseling, and other support roles. Account for student need, service intensity, travel, required minutes, and licensure rather than relying on ratios alone.
- Compare approximately five neighboring or similar districts selected for enrollment, grade configuration, geography, demographics, service delivery, and labor market. Normalize fiscal years, FTE definitions, outsourced services, salary schedules, benefits, contract days, and stipends where data permit.
- Include a comparative study with Illinois school district report cards, national benchmarks, and evidence-based ratios provided on reimbursement models.
- Analyze alignment of current staffing to the district's strategic plan.
- Gather historical narratives from administration, Human Resources, educators, and Board members about the origin and purpose of positions, supplemental assignments, and staffing exceptions.

## Anticipated Deliverables

**Executive Financial Sustainability Report**
A concise account of deficit drivers, major findings, strengths to preserve, evidence limitations, and prioritized recommendations linking financial sustainability to the student experience.

**Operational/Continuous Improvement Inventory and Decision Matrix**
An editable inventory with strategic alignment, implementation phase and fidelity, historical rationale, student reach, staffing, full annual cost, funding source, research evidence, local outcomes, SWOT findings, and recommended disposition for each strategy.

**Staffing and Resource Alignment Analysis**
Five-year staffing and enrollment trends, schedule and caseload findings, compensation and supplemental-pay comparisons, relevant policy considerations, and opportunities for alignment.

**Leadership and Board Presentations**
A draft findings session with administration, administrative briefings, and Board presentation by April 2027. Materials will include an executive slide deck, public-facing summary, and core messages and questions and answers to explain the process, and findings under consideration. Public materials will exclude identifiable student information and confidential personnel details.

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## Proposed Timeline

Recommended start: November 2026

The schedule reserves early March for administrative validation and the remainder of March for final reporting and the Board presentation. Meeting dates will be set at onboarding.

| Timeline | Activities | Onsite Time |
|---|---|---|
| November 2026 | Launch; financial baseline; leadership and department interviews; strategy inventory; peer selection. | **Visit 1** 2 days |
| December 2026 | School visits; observations; strategy and staffing interviews; educator and parent groups; initial schedule review; inventory and implementation profiles. | **Visit 2** 3 days |
| January 2027 | Student and remaining focus groups; targeted follow-up; staffing and caseload validation; SWOT survey synthesis. | **Visit 3** 3 days |
| February 2027 | Triangulate evidence; complete comparisons and cost analysis; prepare draft report. | **Visit 4** 2 days |
| March 1–12 2027 | Deliver draft by March 5; administrative review and factual validation; resolve material questions; refine recommendations and communications. | Virtual review |
| March 15–31 2027 | Deliver final deliverables by March 19; administrative briefing and Board presentation by March 31, aligned to the Board calendar. | **Visit 5** 2 days |

**Onsite Engagement**
The proposed allowance is five visits totaling 12 working days led by Dr. Mueller, exclusive of travel time. Visits 1–4 combine data work sessions, interviews, focus groups, school observations, and leadership facilitation; Visit 5 supports final briefings and presentation. A typical onsite day allows up to six hours of facilitated sessions or observations, plus synthesis and preparation. Evening family groups or the Board meeting may be scheduled within the visit.

Biweekly virtual meetings, remote analysis, survey administration, peer research, and follow-up interviews will occur between visits. Winter break will be protected in scheduling. If staffing notices or budget decisions are due before March, the district should identify those deadlines at launch so preliminary findings can be sequenced accordingly.

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# Proposed Fees

| Name & Description of Service | Price |
|---|---|
| **Financial and Staffing Audit Services**<br>Five-month advisory review including financial and strategy analysis; staffing and peer comparisons; five onsite visits totaling 12 working days; school community engagement; monthly updates; anticipated deliverables; final reports and presentations.<br><br>The Donovan Group proposes a fixed project fee, billed in five equal monthly installments from November 2026 through March 2027.<br><br>*Billed monthly at **$13,680** for a total of five months and amount of **$68,400.** The Donovan Group works on monthly fixed-fee basis. There are no overages and no additional charges for needed travel for onsite meetings or facilitation.* | $68,400.00 |

**Thank you for the opportunity.**

I look forward to partnering with Crete-Monee School District 201U to connect financial and staffing decisions to the district's strategic priorities, preserve meaningful opportunities for students, and provide administration and the Board with a practical path toward a balanced and sustainable budget.

Please let me know if there is anything else I can provide to explain our services and demonstrate the value of our partnership.

Thank you,



**Dr. Lori Mueller**
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