

VENDOR CONTRACT

Between _____ and
(Company Name)

THE INTERLOCAL PURCHASING SYSTEM (TIPS)

For

PROFESSIONAL SERVICES

CONTRACT NUMBER 3042816

General Information

The vendor contract shall include the contract, the terms and conditions, special terms and conditions, any agreed upon amendments, as well as all of the sections of the solicitation and the awarded vendor's proposal. Once signed, if an awarded vendor's proposal varies or is unclear in any way from the TIPS contract, TIPS, at its sole discretion, will decide which provision will prevail. Other documents to be included are the awarded vendor's proposals, task orders, purchase orders and any adjustments which have been issued.

The following pages will constitute the contract between the successful vendors(s) and TIPS. Bidders shall state, in a separate writing, and include with their proposal response, any required exceptions or deviations from these terms, conditions, and specifications. If agreed to by TIPS, they will be incorporated into the final contract.

The Vendor Contract ("Contract") made and entered into by and between The Interlocal Purchasing System (hereinafter referred to as "TIPS" respectfully) a government cooperative purchasing program authorized by the Region VIII Education Service Center, having its principal place of business at 4845 US Hwy 271 North, Pittsburg, Texas 75686. This contract consists of the provisions set forth below, including provisions of all Attachments referenced herein. In the event of a conflict between the provisions set forth below and those contained in any Attachment, the provisions set forth shall control.

Definitions

PURCHASE ORDER is the TIPS member's approval providing the authority to proceed with the negotiated delivery order under the contract. Special terms and conditions as agreed to between the vendor and TIPS member will be added as addendums to the PO. Items such as certificate of insurance, bonding requirements, small or disadvantaged business goals are some of the addendums possible.

PREMIUM HOURS are defined as those hours not included in regular hours or recognized holidays. Premium hours are to be approved by the TIPS member for each delivery order and noted in the delivery order proposal as a line item during negotiations.

REGULAR HOURS are defined as those hours between the hours of 7 AM and 6 PM Monday thru Friday.

Terms and Conditions

Freight

All deliveries shall be freight prepaid, F.O.B. destination and shall be included in all pricing offered unless otherwise clearly stated in writing.

Warranty Conditions

All supplies equipment and services shall include manufacturer's minimum standard warranty unless otherwise agreed to in writing. Vendor shall be an authorized dealer, distributor or manufacturer for all products. All equipment proposed shall be new unless clearly stated in writing.

Customer Support

The Vendor shall provide timely and accurate customer support to TIPS members. Vendors shall respond to such requests within one (1) working day after receipt of the request. Vendor shall provide training regarding products and services supplied by the Vendor unless otherwise clearly stated in writing at the time of purchase. (Unless training is a line item sold or packaged and must be purchased with product.)

Contracts

All contracts and agreements between Vendors and TIPS Members shall strictly adhere to the statutes that are set forth in the Uniform Commercial Code as most recently revised.

Contracts for purchase will normally be put into effect by means of a purchase order(s) executed by authorized agents of the participating government entities.

Davis Bacon Act requirements will be met when Federal Funds are used for construction and/or repair of buildings.

Tax exempt status

A taxable item sold, leased, rented to, stored, used, or consumed by any of the following governmental entities is exempted from the taxes imposed by this chapter:(1) the United States; (2) an unincorporated instrumentality of the United States; (3) a corporation that is an agency or instrumentality of the United States and is wholly owned by the United States or by another corporation wholly owned by the United States;(4) the State of Texas; (5) a Texas county, city, special district, or other political subdivision; or (6) a state, or a governmental unit of a state that borders Texas, but only to the extent that the other state or governmental unit

exempts or does not impose a tax on similar sales of items to this state or a political subdivision of this state. Texas Tax Code § 151.309.

Assignments of contracts

No assignment of contract may be made without the prior written approval of TIPS. Payment can only be made to the awarded Vendor or vendor assigned dealer.

Disclosures

1. Vendor affirms that he/she has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant in connection with this contract.
2. Vendor shall attach, in writing, a complete description of any and all relationships that might be considered a conflict of interest in doing business with participants in the TIPS program.
3. The vendor affirms that, to the best of his/her knowledge, the offer has been arrived at independently, and is submitted without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this contract.

Renewal of Contracts

The contract is for one (1) year with an option for renewal for 2 consecutive years. Total term of contract can be up to 3 years if sales are reported through the contract and both parties agree.

Shipments

The Vendor shall ship ordered products within five (5) working days after the receipt of the order. If a product cannot be shipped within that time, the Vendor shall notify TIPS and the requesting entity as to why the product has not shipped and shall provide an estimated shipping date, if applicable. TIPS or the requesting entity may cancel the order if estimated shipping time is not acceptable.

Invoices

The Vendor or vendor assigned dealer shall submit invoices, to the TIPS participant. Each invoice shall include the TIPS participant's purchase order number. The shipment tracking number or pertinent information for verification of TIPS participant receipt shall be made available upon request. The Vendor or vendor assigned dealer shall not invoice for partial shipments unless agreed to in writing in advance by TIPS and the TIPS participant.

Payments

The TIPS participant will make payments directly to the Vendor or vendor assigned dealer at net 30 days after receiving invoice.

Pricing

The Vendor contracts to provide pricing to TIPS and its participating governmental entities that is the lowest pricing available to like cooperative purchasing customers and the pricing shall remain so throughout the duration of the contract.

The Vendor agrees to promptly lower the cost of any product purchased through TIPS following a reduction in the manufacturer or publisher's direct cost to the Vendor. Price increases will be honored. However, the Vendor shall honor previous prices for thirty (30) days after written notification to TIPS of an increase.

All pricing submitted to TIPS shall include the participation fee to be remitted to TIPS by the Vendor. Vendor will not show adding the fee to the invoice presented to customer. The normal fee is 2%, but can be negotiated with the Vendor.

Participation Fees

Vendor or vendor assigned dealer contracts to pay the participation fee for all contract sales to TIPS on a monthly scheduled report. Vendor must login to the TIPS database and use the "Submission Report" section to report sales. The Vendor or vendor assigned dealers are responsible for keeping record of all sales that go through the TIPS contract. Failure to pay the participation fee will result in termination of contract. Please contact TIPS at tips@tips-usa.com or call (866) 839-8477 if you have questions about paying fees.

Indemnity

- 1. Indemnity for Personality Contracts.** Vendor agrees to indemnify and hold harmless and defend TIPS, TIPS member(s), officers and employees, from and against all claims and suits for damages, injuries to persons (including death), property damages, losses, and expenses including court costs and attorney's fees, arising out of, or resulting from, Vendor's performance of this contract, including all such causes of action based upon common, constitutional, or statutory law, or based in whole or in part, upon allegations of negligent or intentional acts on the part of the Vendor, its officers, employees, agents, subcontractors, licensees, invitees, whether or not such claims are based in whole or in part upon the negligent acts or omissions of the TIPS, TIPS member(s), officers, employees, or agents.
- 2. Indemnity for Performance Contracts.** The Vendor agrees to indemnify and hold harmless and defend TIPS, TIPS member(s), officers and employees from and against all claims and suits for damages, injuries to persons (including death), property damages, losses, and expenses including court costs and attorney's fees, arising out of, or resulting from, Vendor's work under this contract, including all such causes of action based upon common, constitutional, or statutory law, or based in whole or in part, upon allegations of negligent or intentional acts on the part of the Vendor, its officers, employees, agents, subcontractors, licensees, or invitees. Vendor further agrees to indemnify and

hold harmless and defend TIPS, TIPS member(s), officers and employees, from and against all claims and suits for injuries (including death) to an officer, employee, agent, subcontractor, supplier or equipment lessee of the Vendor, arising out of, or resulting from, Vendor's work under this contract whether or not such claims are based in whole or in part upon the negligent acts or omissions of the TIPS, TIPS member(s), officers, employees, or agents.

Attorney's Fees--Texas Local Government Code § 271.159 is expressly referenced.

Pursuant to §271.159, TEXAS LOC. GOV'T CODE, in the event that any one of the Parties is required to obtain the services of an attorney to enforce this Agreement, the prevailing party, in addition to other remedies available, shall be entitled to recover reasonable attorney's fees and costs of court.

Multiple Vendor Awards

TIPS reserves the right to award multiple vendor contracts for categories when deemed in the best interest of the TIPS membership. Bidders scoring 80% or above will be considered for an award. Categories are established at the discretion of TIPS.

State of Texas Franchise Tax

By signature hereon, the bidder hereby certifies that he/she is not currently delinquent in the payment of any franchise taxes owed the State of Texas under Chapter 171, Tax Code.

Miscellaneous

The Vendor acknowledges and agrees that continued participation in TIPS is subject to TIPS sole discretion and that any Vendor may be removed from the participation in the Program at any time with or without cause. Nothing in the contract or in any other communication between TIPS and the Vendor may be construed as a guarantee that TIPS participants will submit any orders at any time. TIPS reserves the right to request additional proposals for items already on contract at any time.

Purchase Order Pricing/Product Deviation

If a deviation of pricing/product on a purchase order occurs, TIPS is to be notified within 24 hours of receipt of order.

Cancellation for non-performance or contract deficiency

TIPS may terminate any contract if TIPS Members have not used the contract, or if purchase volume is determined to be "low volume" in any 12-month period. TIPS reserves the right to cancel the whole or any part of this contract due to failure by awarded vendor to carry out any obligation, term or condition of the contract. TIPS may issue a written deficiency notice to awarded vendor for acting or failing to act in any of the following:

- Providing material that does not meet the specifications of the contract;

- Providing work and/or material that was not awarded under the contract;
- Failing to adequately perform the services set forth in the scope of work and specifications;
- Failing to complete required work or furnish required materials within a reasonable amount of time;
- Failing to make progress in performance of the contract and/or giving TIPS reason to believe that awarded vendor will not or cannot perform the requirements of the contract; and/or
- Performing work or providing services under the contract prior to receiving a TIPS reviewed purchase order for such work.

Upon receipt of the written deficiency, awarded vendor shall have ten (10) days to provide a satisfactory response to TIPS. Failure to adequately address all issues of concern may result in contract cancellation. Upon cancellation under this paragraph, all goods, materials, work, documents, data and reports prepared by awarded vendor under this contract shall become the property of the TIPS Member on demand.

TIPS Member Purchasing Procedures

Purchase orders are issued by participating TIPS member to the awarded vendor indicating on the PO "Contract Number". Purchase Order is emailed to TIPS at tipspo@tips-usa.com.

- Awarded vendor delivers goods/services directly to the participating member.
- Awarded vendor invoices the participating TIPS member directly.
- Awarded vendor receives payment directly from the participating member.
- Awarded vendor reports sales monthly to TIPS (unless prior arrangements have been made with TIPS to report monthly).

Form of Contract

The form of contract for this solicitation shall be the Request for Proposal, the awarded proposal(s) and best and final offer(s), and properly issued and reviewed purchase orders referencing the requirements of the Request for Proposals. If a vendor submitting an offer requires TIPS and/or TIPS Member to sign an additional agreement, a copy of the proposed agreement must be included with the proposal.

Vendor contract documents: TIPS will review proposed vendor contract documents. Vendor's contract document shall not become part of TIPS's contract with vendor unless and until an authorized representative of TIPS reviews and approves it.

Licenses

Awarded vendor shall maintain in current status all federal, state and local licenses, bonds and permits required for the operation of the business conducted by awarded vendor. Awarded vendor shall remain fully informed of and in compliance with all ordinances and regulations pertaining to the lawful provision of services under the contract. TIPS reserves the right to stop

work and/or cancel contract of any awarded vendor whose license(s) expire, lapse, are suspended or terminated.

Novation

If awarded vendor sells or transfers all assets or the entire portion of the assets used to perform this contract, a successor in interest must guarantee to perform all obligations under this contract. TIPS reserves the right to accept or reject any new party. A simple change of name agreement will not change the contractual obligations of awarded vendor.

Site Requirements (when applicable to service or job)

Cleanup: Awarded vendor shall clean up and remove all debris and rubbish resulting from their work as required or directed by TIPS Member. Upon completion of work, the premises shall be left in good repair and an orderly, neat, clean and unobstructed condition.

Preparation: Awarded vendor shall not begin a project for which TIPS Member has not prepared the site, unless awarded vendor does the preparation work at no cost, or until TIPS Member includes the cost of site preparation in a purchase order.

Site preparation includes, but is not limited to: moving furniture, installing wiring for networks or power, and similar pre-installation requirements.

Registered sex offender restrictions: For work to be performed at schools, awarded vendor agrees that no employee of a sub-contractor who has been adjudicated to be a registered sex offender will perform work at any time when students are or reasonably expected to be present. Awarded vendor agrees that a violation of this condition shall be considered a material breach and may result in the cancellation of the purchase order at the TIPS Member's discretion.

Awarded vendor must identify any additional costs associated with compliance of this term. If no costs are specified, compliance with this term will be provided at no additional charge.

Safety measures: Awarded vendor shall take all reasonable precautions for the safety of employees on the worksite, and shall erect and properly maintain all necessary safeguards for protection of workers and the public. Awarded vendor shall post warning signs against all hazards created by the operation and work in progress. Proper precautions shall be taken pursuant to state law and standard practices to protect workers, general public and existing structures from injury or damage.

Smoking

Persons working under contract shall adhere to local smoking policies. Smoking will only be permitted in posted areas or off premises.

Invoices

The awarded vendor shall submit invoices to the participating entity clearly stating "Per TIPS Contract". The shipment tracking number or pertinent information for verification shall be made available upon request.

Marketing

Awarded vendor agrees to allow TIPS to use their name and logo within website, marketing materials and advertisement. Any use of TIPS name and logo or any form of publicity, inclusive of press release, regarding this contract by awarded vendor must have prior approval from TIPS.

Supplemental agreements

The entity participating in the TIPS contract and awarded vendor may enter into a separate supplemental agreement to further define the level of service requirements over and above the minimum defined in this contract i.e. invoice requirements, ordering requirements, specialized delivery, etc. Any supplemental agreement developed as a result of this contract is exclusively between the participating entity and awarded vendor. TIPS, its agents, TIPS members and employees shall not be made party to any claim for breach of such agreement.

Legal obligations

It is the responding vendor's responsibility to be aware of and comply with all local, state and federal laws governing the sale of products/services identified in this RFP and any awarded contract thereof. Applicable laws and regulations must be followed even if not specifically identified herein.

Audit rights

Awarded Vendor shall, at their sole expense, maintain appropriate due diligence of all purchases made by TIPS Member that utilizes this Contract. TIPS and Region 8 ESC each reserve the right to audit the accounting for a period of three (3) years from the time such purchases are made. This audit right shall survive termination of this Agreement for a period of one (1) year from the effective date of termination. TIPS shall have authority to conduct random audits of Awarded Vendor's pricing that is offered to TIPS Members. Notwithstanding the foregoing, in the event that TIPS is made aware of any pricing being offered to eligible entities that is materially inconsistent with the pricing under this agreement, TIPS shall have the ability to conduct the audit internally or may engage a third-party auditing firm. In the event of an audit, the requested materials shall be provided in the format and at the location designated by Region 8 ESC or TIPS.

Force Majeure

If by reason of Force Majeure, either party hereto shall be rendered unable wholly or in part to carry out its obligations under this Agreement then such party shall give notice and fully particulars of Force Majeure in writing to the other party within a reasonable time after occurrence of the event or cause relied upon, and the obligation of the party giving such notice, so far as it is affected by such Force Majeure, shall be suspended during the continuance of the inability then claimed, except as hereinafter provided, but for no longer period, and such party shall endeavor to remove or overcome such inability with all reasonable dispatch.

Services

When applicable, performance bonds will be required on construction or labor required jobs over \$100,000 and payment bonds on jobs over \$25,000 or awarded vendor will meet the TIPS member's local and state purchasing requirements. Awarded vendors may need to provide additional capacity as jobs increase. Bonds will not require that a fee be paid to TIPS. The actual cost of the bond will be a pass through to the TIPS member and added to the purchase order.

Scope of Services

The specific scope of work for each job shall be determined in advance and in writing between TIPS Member and Awarded vendor. It is okay if the TIPS member provides a general scope, but the awarded vendor should provide a written scope of work to the TIPS member as part of the proposal. Once the scope of the job is agreed to, the TIPS member will issue a PO with the estimate referenced as an attachment along with bond and any other special provisions agreed to for the TIPS member. If special terms and conditions other than those covered within this solicitation and awarded contracts are required, they will be attached to the PO and shall take precedence over those in the base contract.

Project Delivery Order Procedures

The TIPS member having approved and signed an interlocal agreement, or other TIPS membership document, may make a request of the awarded vendor under this contract when the TIPS member has services that need to be undertaken. Notification may occur via phone, the web, email, fax, or in person.

Upon notification of a pending request, the awarded vendor shall make contact with the TIPS member as soon as possible, but must make contact with the TIPS member within two working days.

Scheduling of Projects

Scheduling of projects (if applicable) will be accomplished when the TIPS member issues a purchase order that will serve as "the notice to proceed". The period for the delivery order will include the mobilization, materials purchase, installation and delivery, design, weather, and site cleanup and inspection. No additional claims may be made for delays as a result of these items. When the tasks have been completed the awarded vendor shall notify the client and have the TIPS member inspect the work for acceptance under the scope and terms in the PO. The TIPS member will issue in writing any corrective actions that are required. Upon completion of these items, the TIPS member will issue a completion notice and final payment will be issued.

Support Requirements

If there is a dispute between the awarded vendor and TIPS member, TIPS or its representatives will assist in conflict resolution or third party (mandatory mediation), if requested by either party. TIPS, or its representatives, reserves the right to inspect any project and audit the awarded vendors TIPS project files, documentation and correspondence.

Special Terms and Conditions

It is the intent of TIPS to contract with a reliable, high performance vendor to supply products and services to government and educational agencies. It is the experience of TIPS that the following procedures provide TIPS, the Vendor, and the participating agency the necessary support to facilitate a mutually beneficial relationship. The specific procedures will be negotiated with the successful vendor.

- **Contracts:** All vendor purchase orders must be emailed to TIPS at tipspo@tips-usa.com. Should an agency send an order direct to vendor, it is the vendor's responsibility to forward the order to TIPS at the email above within 24 business hours and confirm its receipt with TIPS.
 - **Promotion of Contract:** It is agreed that Vendor will encourage all eligible entities to purchase from the TIPS Program. Encouraging entities to purchase directly from the Vendor and not through TIPS contract is not acceptable to the terms and conditions of this contract and will result in removal of Vendor from Program. Vendor is expected to use marketing funds for the marketing and promotion of this contract.
 - **Daily Order Confirmation:** All contract purchase orders will be approved daily by TIPS and sent to vendor. The vendor must confirm receipt of orders to the TIPS member (customer) within 24 business hours.
 - **Vendor custom website for TIPS:** If Vendor is hosting a custom TIPS website, then updated pricing must be posted by 1st of each month.
 - **Back Ordered Products:** If product is not expected to ship within 3 business days, customer is to be notified within 24 hours and appropriate action taken based on customer request.
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Check one of the following responses to the General Terms and Special Terms and Conditions:

() We take no exceptions/deviations to the general and/or special terms and conditions.

(Note: If none are listed below, it is understood that no exceptions/deviations are taken.)

() We take the following exceptions/deviations to the general and/or special terms and conditions. All exceptions/deviations must be clearly explained. Reference the corresponding general or special terms and conditions that you are taking exceptions/deviations to. The proposer must clearly state if you are adding additional terms and conditions to the general or special terms and conditions. Provide details on your exceptions/deviations below:

The Interlocal Purchasing System (TIPS Cooperative) Supplier Response

Bid Information		Contact Information		Ship to Information
Bid Creator	Kim Thompson Coordinator of Office Operations	Address	Region VIII Education Service Center 4845 US Highway 271 North Pittsburg, TX 75686	Address
Email	Kim.Thompson@tips-usa.com	Contact	Kim Thompson, TIPS Office Manager	Contact
Phone	(903) 575-2608			Department
Fax	(866) 929-4402			Building
Bid Number	3042816	Department		Floor/Room
Title	Professional Services	Building		Telephone
Bid Type	RFP			Fax
Issue Date	2/1/2016 08:01:01 AM (CT)	Floor/Room		Email
Close Date	3/11/2016 03:00:00 PM (CT)	Telephone	+1 (866) 839-8477	
Need by Date		Fax	+1 (866) 839-8472	
		Email	bids@tips-usa.com	

Supplier Information

Company Gibson Consulting Group, Inc.
 Address 1801 South MOPAC Expressway
 Suite 270
 Austin, TX 78746
 Contact Brandon Ney
 Department
 Building
 Floor/Room
 Telephone 1 (512) 3280884
 Fax 1 (512) 3280884
 Email bney@gibsonconsult.com
 Submitted 3/11/2016 08:18:29 AM (CT)
 Total \$0.00

By submitting your response, you certify that you are authorized to represent and bind your company.

Signature Greg Gibson

Email ggibson@gibsonconsult.com

Supplier Notes

Greg Gibson, Gibson Consulting Group's authorized representative, has given me permission to submit this bid electronically on his behalf through this profile. Greg Gibson has signed all response attachments.

Bid Notes

Bid Activities

Bid Messages

Please review the following and respond where necessary

#	Name	Note	Response
1	Yes - No	Disadvantaged/Minority/Women Business Enterprise - D/M/WBE (Required by some participating governmental entities) Vendor certifies that their firm is a D/M/WBE? Vendor must upload proof of certification to the "Response Attachments" D/M/WBE CERTIFICATES section.	No
2	Yes - No	Highly Underutilized Business - HUB (Required by some participating governmental entities) Vendor certifies that their firm is a HUB? Vendor must upload proof of certification to the "Response Attachments" HUB CERTIFICATES section.	No
3	Yes - No	The Vendor can provide services and/or products to all 50 US States?	Yes
4	States Served:	If answer is NO to question #3, please list which states can be served. (Example: AR, OK, TX)	
5	Company and/or Product Description:	This information will appear on the TIPS website in the company profile section, if awarded a TIPS contract. (Limit 750 characters.)	Gibson Consulting Group, Inc. specializes in K-12 educational services. Having worked in over 250 school systems in 27 states over the past 24 years, Gibson assists with improving the efficiency, effectiveness, and compliance of K-12 education at the state, regional, and school district levels. Gibson provides research and evaluation, survey research, organizational and efficiency analysis, technology consulting, dashboard and data visualization, and internal audit and financial investigation services. Our team includes certified public accountants, researchers with doctorate-level expertise, and other consultants with extensive management, technology, and evaluation experience and expertise. With our diverse team, Gibson customizes each approach to fit the needs of most any consulting effort for our educational clients.
6	Primary Contact Name	Primary Contact Name	Greg Gibson
7	Primary Contact Title	Primary Contact Title	President
8	Primary Contact Email	Primary Contact Email	ggibson@gibsonconsult.com
9	Primary Contact Phone	Enter 10 digit phone number. (No dashes or extensions)	5123280885
10	Primary Contact Fax	Enter 10 digit phone number. (No dashes or extensions)	5123280886
11	Primary Contact Mobile	Enter 10 digit phone number. (No dashes or extensions)	
12	Secondary Contact Name	Secondary Contact Name	Ali Taylan
13	Secondary Contact Title	Secondary Contact Title	Chief Information Officer

14	Secondary Contact Email	Secondary Contact Email	ataylan@gibsonconsult.com
15	Secondary Contact Phone	Enter 10 digit phone number. (No dashes or extensions)	5123280884
16	Secondary Contact Fax	Enter 10 digit phone number. (No dashes or extensions)	
17	Secondary Contact Mobile	Enter 10 digit phone number. (No dashes or extensions)	
18	Admin Fee Contact Name	Admin Fee Contact Name. This person is responsible for paying the admin fee to TIPS.	Beth Frank
19	Admin Fee Contact Email	Admin Fee Contact Email	bfrank@gibsonconsult.com
20	Admin Fee Contact Phone	Enter 10 digit phone number. (No dashes or extensions)	5123280884
21	Purchase Order Contact Name	Purchase Order Contact Name. This person is responsible for receiving Purchase Orders from TIPS.	Beth Frank
22	Purchase Order Contact Email	Purchase Order Contact Email	bfrank@gibsonconsult.com
23	Purchase Order Contact Phone	Enter 10 digit phone number. (No dashes or extensions)	5123280884
24	Company Website	Company Website (Format - www.company.com)	www.gibsonconsult.com
25	Federal ID Number:	Federal ID Number also known as the Employer Identification Number. (Format - 12-3456789)	74-2898858
26	Primary Address	Primary Address	1801 South MOPAC Expressway
27	Primary Address City	Primary Address City	Austin
28	Primary Address State	Primary Address State (2 Digit Abbreviation)	Texas
29	Primary Address Zip	Primary Address Zip	78746

30 Search Words:

Please list search words to be posted in the TIPS database about your company that TIPS website users might search. Words may be product names, manufacturers, or other words associated with the category of award. YOU MAY NOT LIST NON-CATEGORY ITEMS. (Limit 500 words) (Format: product, paper, construction, manufacturer name, etc.)

management review, performance review, performance, management, efficiency, staffing, process improvement, process re-engineering, performance measurement, curriculum, metric, technology assessment, strategy, requirements definition, human resource, student evaluation, quality assurance, feasibility, needs assessment, operations consulting, management consulting, cost of service, funding, expenditure analysis, benchmarking, compliance review, program compliance, auditor, budget, internal audit, audit, planning, implementation, management, study, operations, school, education, learning, grant, statistical, research, evaluator, assessment, program evaluation, program review, initiative, formative, summative, 21st CCLC, survey, process assessment, monitoring, assessment, operational streamlining, human capital, curriculum audit, itil, information technology infrastructure library, consulting, audit, educational, board of education, school district, Business Intelligence, Enterprise Resource Planning, Data Warehouse, ERP, system selection, smaller learning communities, after school, enhancing education, dashboard, implementation, technology, forensic audit, management audit, finance, school safety, internal audit, activity funds, process mapping, school-to-prison, school discipline, violence prevention, Impact fees, user fees, cost allocation plans, performance measures, exclusionary discipline, instructional technology, technology performance audit, engagement, perception survey, climate survey, school climate, special education, process mapping, charter school, risk assessment, payroll process, supplemental education services, turnaround, teacher incentive fund, survey instrument, data modeling

31 Yes - No

Do you wish to be eligible to participate in a TIPS contract in which a TIPS member utilizes federal funds on contracts exceeding \$100,000? (Non-Construction) (If YES, vendor should download the Federal Regulations for Contracts document from the Attachments section, fill out the form and submit the document in the "Response Attachments" FEDERAL FUNDS section.) (Vendor must also download the Suspension or Debarment Certificate document from the Attachments section, fill out the form and submit the document in the "Response Attachments" SUSPENSION OR DEBARMENT section.)

Yes

32	Yes - No	Certification of Residency (Required by the State of Texas) Company submitting bid is a Texas resident bidder?	Yes
33	Company Residence (City)	Vendor's principal place of business is in the city of?	Austin
34	Company Residence (State)	Vendor's principal place of business is in the state of?	Texas
35	Felony Conviction Notice:	(Required by the State of Texas) My firm is, as outlined on PAGE 5 in the Instructions to Bidders document: (Questions 36 - 37)	(No Response Required)
36	Yes - No	A publicly held corporation; therefore, this reporting requirement is not applicable?	No
37	Yes - No	Is owned or operated by individual(s) who has/have been convicted of a felony? If answer is YES, a detailed explanation of the name(s) and conviction(s) must be uploaded to the "Response Attachments" FELONY CONVICTION section.	No
38	Pricing Information:	Pricing information section. (Questions 39 - 42)	(No Response Required)
39	Yes - No	In addition to the typical unit pricing furnished herein, the Vendor agrees to furnish all current and future products at prices that are proportionate to Dealer Pricing. If answer is NO, include a statement detailing how pricing for TIPS participants would be calculated in the PRICING document that is uploaded to the "Response Attachments" PRICING section.	Yes
40	Yes - No	Pricing submitted includes the TIPS administration fee?	Yes
41	Yes - No	Vendor agrees to remit to TIPS the required administration fee?	Yes
42	Yes - No	Additional discounts to TIPS members for bulk quantities or scope of work?	No
43	Start Time	Average start time after receipt of customer order is ____ working days?	10
44	Years Experience	Company years experience in this category?	24
45	Resellers:	Does the vendor have resellers that it will name under this contract? (If applicable, vendor should download the Reseller/Dealers spreadsheet from the Attachments section, fill out the form and submit the document in the "Response Attachments" RESELLERS section.	No
46	Prices are guaranteed for?	(__ Month(s), __ Year(s), or Term of Contract) (Standard term is "Term of Contract")	Term of Contract

Line Items

Response Total: \$0.00

2 CFR PART 200 Contract Provisions

Required Federal contract provisions of Federal Regulations for Contracts

The following provisions are required to be in place and agreed if the procurement is funded with federal funds. TIPS or its members are the subgrantee or subrecipient by definition in most cases. Not all provisions herein apply to all contracts. Compliance is required as it applies to the individual purchase contract.

Appendix II to Part 200

Contract Provisions for Non-Federal Entity Contracts Under Federal Awards

2 CFR PART 200

These contract provisions are incorporated by reference or attachment into all contracts with your company when TIPS or its members purchase is with federal funds if you respond to a TIPS competitive procurement request for proposals or bid..

In addition to other provisions required by the Federal agency or non-Federal entity, all contracts made by the non-Federal entity under the Federal award must contain provisions covering the following, as applicable.

Federal Rule (1) Contracts for more than the simplified acquisition threshold currently set at \$150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

Notice: Pursuant to Federal Rule (1) above, when federal funds are expended by TIPS or its members, TIPS or its members reserves all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.

Does vendor agree? YES Initial of Authorized Company Official

Federal Rule (2) Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of \$10,000)

Pursuant to Federal Rule (2) above, when federal funds are expended by TIPS OR ITS MEMBERS, TIPS OR ITS MEMBERS reserves the right to terminate any agreement in excess of \$10,000 resulting from this procurement process for cause after giving the vendor an appropriate opportunity and up to 30 days, to cure the causal breach of terms and conditions. TIPS OR ITS MEMBERS reserves the right to terminate any agreement in excess of \$10,000 resulting from this procurement process for convenience with 30 days notice in writing to the awarded vendor. The vendor would be compensated for work performed and goods procured as of the termination date if for convenience of the TIPS OR ITS MEMBERS. Any award under this procurement process is not exclusive and the District reserves the right to purchase goods and services from other vendors when it is in the best interest of the District.

Does vendor agree? YES Initial of Authorized Company Official

Federal Rule (3) Equal Employment Opportunity. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

2 CFR PART 200 Contract Provisions

Pursuant to Federal Rule (3) above, when federal funds are expended by TIPS OR ITS MEMBERS, for all construction contracts awarded by grantees and their contractors or subgrantees, the proposer certifies that during the term of an award, when federal funds are expended, by the TIPS OR ITS MEMBERS resulting for this procurement process the vendor will be in compliance with Equal Opportunity Employment laws specifically Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity," as amended by Executive Order 11375 of October 13, 1967, and as supplemented in Department of Labor regulations (41 CFR chapter 60).

Does vendor agree? YES Initial of Authorized Company Official

Federal Rule (4) Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

Pursuant to Federal Rule (4) above, when federal funds are expended by TIPS OR ITS MEMBERS, during the term of an award for all contracts and subgrants for construction or repair, when Federal Funds are expended, by the TIPS OR ITS MEMBERS resulting for this procurement process the vendor will be in compliance with all provisions listed or referenced therein.

Does vendor agree? YES Initial of Authorized Company Official

Federal Rule (5) Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

Pursuant to Federal Rule (5) above, when federal funds are expended by TIPS OR ITS MEMBERS, the proposer certifies that during the term of an award by the TIPS OR ITS MEMBERS resulting from this procurement process for construction contracts awarded by grantees and subgrantees the proposer agrees to be in compliance with all requirements listed or referenced therein.

Does vendor agree? YES Initial of Authorized Company Official

Federal Rule (6) Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a

2 CFR PART 200 Contract Provisions

small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.

Pursuant to Federal Rule (6) above, when federal funds are expended by TIPS OR ITS MEMBERS, TIPS OR ITS MEMBERS requires that the proposer certify that during the term of an award by the TIPS OR ITS MEMBERS resulting from this procurement process the vendor agrees to the terms listed and referenced therein.

Does vendor agree? YES Initial of Authorized Company Official

Federal Rule (7) Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended—Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

Pursuant to Federal Rule (7) above, when federal funds are expended by TIPS OR ITS MEMBERS, TIPS OR ITS MEMBERS requires that the proposer certify that during the term of an award by the TIPS OR ITS MEMBERS resulting from this procurement process the vendor agrees to the terms listed and referenced therein.

Does vendor agree? YES Initial of Authorized Company Official

Federal Rule (8) Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award \$25,000 or greater (see 2 CFR 180.220) must not be made to parties listed on the governmentwide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

Pursuant to Federal Rule (8) above, when federal funds are expended by TIPS OR ITS MEMBERS, TIPS OR ITS MEMBERS requires the proposer certify that during the term of an award by the TIPS OR ITS MEMBERS resulting for this procurement process the vendor certifies that they are not debarred from receiving a contract from the federal government as provided therein.

Does vendor agree they are not debarred as specified above ? YES Initial of Authorized Company Official

Federal Rule (9) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

Pursuant to Federal Rule (9) above, when federal funds are expended by TIPS OR ITS MEMBERS, TIPS OR ITS MEMBERS requires the proposer certify that during the term and after the awarded term of an award by the TIPS OR ITS MEMBERS resulting for this procurement process the vendor certifies to the terms included or referenced in Federal Rule 9 above.

2 CFR PART 200 Contract Provisions

Does vendor certify to the provisions in Federal Rule (9) above? YES Initial of Authorized Company Official

Federal Rule (10) 2 CFR 200.233 Retention of all required records for three years after grantees or subgrantees make final payments and all other pending matters are closed.

Pursuant to Federal Rule (10) above, when federal funds are expended by TIPS OR ITS MEMBERS, TIPS OR ITS MEMBERS requires the proposer certify that the awarded vendor retain all required records for three years after grantees or subgrantees make final payments and all other pending matters are closed.

Does vendor agree? YES Initial of Authorized Company Official

Federal Rule (11) 2 CFR §200.322 Procurement of recovered materials. A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines. [78 FR 78608, Dec. 26, 2013, as amended at 79 FR 75885, Dec. 19, 2014]

Pursuant to Federal Rule (11) above, when federal funds are expended by TIPS OR ITS MEMBERS, TIPS OR ITS MEMBERS requires proposer certify that during the term of an award by the TIPS OR ITS MEMBERS resulting for this procurement process the vendor will be in compliance with mandatory standards and policies relating to Procurement of recovered materials which are listed above.

Does vendor agree they will comply? YES Initial of Authorized Company Official

Company Name Ebson Consulting Group, Inc.
Print name of authorized representative Jared Ebson
Signature of authorized representative [Signature]
Date 3/9/16

Signature above acknowledges all provisions in this four page document and the vendor/proposer/bidder responses herein to the 11 rules.

Federal Requirements for Procurement and Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

If the TIPS member anticipate possibly using federal funds for procurement under this potential award and is required to obtain the following compliance assurance.

1. Will you be subcontracting any of your work under this award if you are successful?

(Check one)

YES or NO

2. If yes, do you agree to comply with the following federal requirements? (Check one)

YES or NO

2 CFR §200.321 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

(a) The non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

(b) Affirmative steps must include:

- (1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;
- (2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;
- (3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;
- (4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;
- (5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce ; and
- (6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

Company Name Gibson Consulting Group, Inc.

Name of authorized representative Greg Gibson

Signature of authorized representative 

Date 3/9/16

SUSPENSION OR DEBARMENT CERTIFICATE

Non-Federal entities are prohibited from contracting with or making sub-awards under covered transactions to parties that are suspended or debarred or whose principals are suspended or debarred. Covered transactions include procurement for goods or services equal to or in excess of \$25,000.00. Contractors receiving individual awards for \$25,000.00 or more and all sub-recipients must certify that the organization and its principals are not suspended or debarred.

By submitting this offer and signing this certificate, this bidder:

Certifies that no suspension or disbarment is in place, which would preclude receiving a federally funded contract under the EDGAR, §200.212 Suspension and debarment.

Vendor Name: Gibson Consulting Group, Inc.

Vendor Address: 1801 South MOPAC Expressway, Suite 270, Austin, Texas, 78746

Vendor E-mail Address: ggibson@gibsonconsult.com

Vendor Telephone: (512) 328-0885

Authorized Company Official's Name: Greg Gibson

Signature of Company Official:  _____

Date: 3/9/16

References

**** Must have at least 3 References. References must be School, City, County, University, State Agency or Other Government.**

Organization	City	State	Contact Name	Contact Phone
Texas Education Agency	Austin	Texas	Jennifer Broussard	(512) 463-1241
Educate Texas	Austin	Texas	Kelty Garbee	(512) 279-7856
Arlington Independent School District	Arlington	Texas	Marcelo Cavazos	(682) 867-4611
Hays Consolidated Independent School District	Kyle	Texas	Marty Kanetzky	(512) 947-6474
Hays Consolidated Independent School District	Kyle	Texas	Michael McKie	(512) 268-8514
Killeen Independent School District	Killeen	Texas	Susan Jones	(254) 200-3670
Killeen Independent School District	Killeen	Texas	Corbett Lawler	(254) 634-1776
Fort Bend Independent School District	Sugar Land	Texas	Jim Rice	(713) 482-2305
Fort Bend Independent School District	Sugar Land	Texas	Grayle James	(281) 799-2873
Fort Bend Independent School District	Sugar Land	Texas	Charles Dupre	(512) 923-0699
Wharton Independent School District	Wharton	Texas	Rachel Rust	(979) 532-3871
Wharton Independent School District	Wharton	Texas	Tina Herrington	(979) 532-3612
Texas Higher Education Coordinating Board	Austin	Texas	Linda Hargrove	(512) 427-6122
Texas Association of School Boards	Austin	Texas	Nancy Cotton	(512) 467-0222
Clark County School District	Las Vegas	Nevada	Carolyn Edwards	(702) 799-1072
New Hampshire Department of Education	Concord	New Hampshire	Mary Lane	(603) 271-3740
New Hampshire Department of Education	Concord	New Hampshire	Amy Jenks	(603) 271-3842
Virginia Department of Planning and Budget	Richmond	Virginia	Cari Corr	(804) 225-4549
Virginia Department of Planning and Budget	Richmond	Virginia	John Ringer	(804) 786-7324

CONTRACT Signature Form

The undersigned hereby proposes and agrees to furnish goods and/or services in compliance with the terms, specifications and conditions at the prices quoted unless noted in writing. The undersigned further certifies that he or she is an authorized agent of the company and has authority to negotiate and contract for the company named below.

Company Name: Gibson Consulting Group, Inc.

Mailing Address: 1801 South MOPAC Expressway, Suite 270

City: Austin

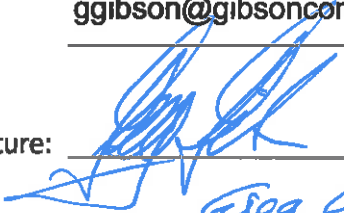
State: Texas

Zip: 78746

Telephone Number: (512) 328-0885

Fax Number: (512) 328-0886

Email Address: ggibson@gibsonconsult.com

Authorized Signature: 

Printed Name: Greg Gibson

Position: president

This contract is for a total TERM of one year with the option of two additional years. Vendors shall honor the participation fee for any sales made based on the TIPS contract. Failure to pay the fee will be grounds for termination of contract and will affect the award of future contracts.

Blenda McNatt 4-28-2016
TIPS Authorized Signature Date

David Wayne Fitts 4-28-2016
Approved by Region VIII ESC Date

Supplementary

Gibson Consulting Group, Inc. (Gibson) focuses exclusively on the educational market, providing many functional areas of expertise. In the following section, we provide a brief summary of our firm's different service areas, several of which encompass the services outlined in the Request for Proposals.

Gibson's Services

Organizational and Efficiency Analysis Services

In the United States, Gibson serves as one of the top three efficiency analysis firms for public education. Our analysts have conducted efficiency studies and related services in five of the largest 12 school systems in the United States – Hillsborough County Public Schools (Florida), Clark County School District (Nevada), Los Angeles Unified School District (California), Fairfax County Public Schools (Virginia), and Houston Independent School District (ISD) (Texas) – amongst others.

Gibson uses its nuanced and multi-dimensional understanding of school systems to help school districts build and improve upon their own efficiency measurement systems. Our analysts assist school districts with analyzing variances within their data, understanding the causes of those variances, and arriving at practical solutions to improve the school system's overall performance. We possess a deep knowledge of each aspect surrounding efficiency analysis, including the following:

- Identification of efficiency measures
- Definition of specific data elements
- Design of data integrity procedures
- Training and coaching of district administrators and staff
- Identification of efficiency improvement opportunities
- Presentation of findings, solutions, and recommendations to district leadership

We maximize this experience and knowledge by helping our clients align organizational structures to improve accountability, re-engineer processes for efficiency at all levels, and create a culture that motivates change. In order to provide these results, we offer several different services surrounding the practice area of efficiency analysis, including the following:

- Policy analysis
- Process re-engineering for improved efficiency
- Development of efficiency measurement systems
- Staff training for efficiency measures analysis
- Analysis of staffing levels and other efficiency factors throughout your organization
- Analysis of private sector program delivery versus in-house operations

- Efficiency operations for school support services (e.g., student transportation, food service, maintenance, and custodial)

Our analysts' efficiency studies have resulted in savings of over \$500 million dollars and up to nine percent of system operating budgets without jeopardizing the delivery of quality instruction.

Performance-Based Budgeting Services

Our performance-based budgeting service builds off of our experience and knowledge with efficiency analysis. With performance-based budgeting, we empower school districts by helping them create an effective system for integrating efficiency analysis and performance into the budgeting process. This powerful change allows management the ability to ensure the equitable allocation of resources, while supporting the most efficient operations. Additionally, performance-based budgeting helps school districts link long-term goals to day-to-day activities. It provides board members and other stakeholders with the information they need to fully understand the implications of the district budget.

The services available under this service area include:

- Redesign of budget packet contents and presentations
- Integration of measurement, budgeting, and planning processes
- Change management
- Data visualization tool to store and report the measures
- Coaching of department staff on how to analyze and improve efficiency

Audits and Investigations Services

Gibson helps school systems with the audit and analysis of operational, program, and financial management processes as well as of the related information systems and data. We also conduct investigations into the risks of potential fraud, particularly in areas where employees may have access to assets and records. Our team includes certified public accountants and other experts who have experience in conducting financial and internal audits, fraud investigations, statistical analysis, and other reviews in the K-12 educational market.

In 2011, the Texas Association of School Boards (TASB) selected Gibson through a competitive process to provide internal audit services to Texas school districts. We have signed a long-term services agreement with TASB, through which we conduct all of our internal audit work for school districts in Texas. Some of these Texas school districts for which we have provided or are providing internal audit services include:

- | | | |
|---------------------------|---------------------|-----------------------|
| ▪ Fort Bend ISD | ▪ Austin ISD | ▪ Arlington ISD |
| ▪ Hays Consolidated ISD | ▪ Grand Prairie ISD | ▪ Killeen ISD |
| ▪ Eanes ISD | ▪ Manor ISD | ▪ IDEA Public Schools |
| ▪ Burnet Consolidated ISD | ▪ Pflugerville ISD | ▪ Comal ISD |

- Hallsville ISD
- Caldwell ISD
- Lumberton ISD
- Granger ISD
- Judson ISD
- Robstown ISD
- Montgomery ISD
- Midland ISD
- Wharton ISD

The work that we performed for each of these clients included one or more internal audit services in the following areas:

- **Risk Assessment and Audit Plan** – Perform comprehensive analysis of the audit universe and develop relative risk rankings of each area, along with a multi-year plan for audits of high risk areas. We typically conduct risk assessments as the first internal audit service for a client, because it helps to establish priorities and plans for future audits in specific areas, such as those listed below.
- **Procurement** – Analyze the processes and perform audit of overall procurement area including purchasing, accounts payable, and cash management procedures. Audit services also include purchasing transaction testing, bidding, contracting, internal controls evaluation, and data analytics to identify abnormalities.
- **Payroll** – This area represents the single largest expenditure for school districts. Audits include testing of pay amounts (including supplemental pay), analysis of payroll processing procedures and interfaces with human resources, evaluation of internal controls, and data analytics to identify abnormalities.
- **Student and Campus Activity Funds** – Review district guidelines and procedures for the management and accounting of activity funds and booster clubs. Audit procedures include compliance testing, internal controls, accounting systems, and financial reporting.
- **Business Services** – Review other business services including budgeting, general accounting, and financial reporting processes to ensure compliance with board policy, efficient operations, and effective internal controls.
- **Human Resources** – Review processes and procedures for recruiting, hiring, and onboarding all staff as well as for providing ongoing support. Review human resource customer service by interviewing human resource customers including school administrators and central office department leaders. Audit processes include testing of hires and terminations, review of information systems, personnel file audits, and compliance testing for all employee categories.
- **Academic Programs** – Review management effectiveness, compliance, and implementation fidelity in the areas of curriculum implementation, student assessments, teacher professional development, teacher evaluation, special education, and bilingual/ESL education.
- **Operations** – Review transportation, facilities management, construction management, and food services for compliance with board policies, effective management practices, accurate data, accurate reporting, and efficient operations.

- **Student Information** – Review student records and the processes through which the district enrolls, grades, disciplines, and reports attendance for students as well as the processes through which the students participate in special programs.
- **Information Technology** – Evaluate the overall information technology control environment and perform detailed analyses of information technology security, operations, application development, network management, and information storage.

Research and Program Evaluation Services

Gibson works closely with school districts, state education agencies, and higher education clients on the design, implementation, and execution of research and program evaluation projects that assess the effectiveness of educational initiatives and grant programs. In conducting evaluation projects, researchers at Gibson employ quantitative and qualitative research methods, using a wide variety of data collection techniques, including surveys, in-depth interviews, focus groups, and classroom observations. Gibson’s researchers utilize descriptive and inferential analyses of student-level, campus-level, and district-level data.

Our program evaluation approach helps our clients better understand the impact that their programs have on students and on educational systems. We provide educational organizations with the information necessary to make data-driven decisions related to key educational initiatives at the state, district, or campus level through the following services:

- Effective analysis of campus-level and student-level data
- Efficient and effective survey administration approaches which elicit the highest response rates possible
- Appropriate descriptive and inferential statistical analyses
- Clear and concise reports with actionable recommendations
- Rigorous research design and varied data collection methodologies
- Classroom observations using valid and reliable instruments
- Analyses of financial and program outcomes data to derive cost effectiveness metrics
- Superior ongoing communication and support throughout the course of the evaluation project

Survey Research Services

Gibson has provided consulting support and services on large-scale survey efforts for numerous clients in the education sector from private educational organizations to public school districts and state education agencies. With expertise in every area pertinent to survey research, our team’s skillset includes instrument design, development of sampling frameworks, data collection (i.e., including both electronic and paper/pencil methods), statistical analyses (i.e., descriptive, inferential, cross-sectional, and longitudinal), and reporting. We have provided clients with static reports of findings, PowerPoint presentations for further dissemination, analytic datasets and databases, as well as dynamic data

visualization tools used by clients to further examine resulting datasets. Our clients express satisfaction with our ability to translate statistical jargon into meaningful results with actionable recommendations.

Technology and Data Visualization Consulting Services

Gibson’s consultants provide school districts with several different technology consulting services including technology department evaluations, organizational studies, data warehousing services, data visualization services, and software system selection services. We assist school districts with all aspects of software selection including requirements gathering, process mapping, process re-engineering, vendor evaluations, and implementation assistance. We also help school districts determine technology needs, develop RFPs, and evaluate vendors and products. During technology department evaluation projects, we collect information through detailed data requests and through interviews with not only technology department staff, but also with technology department customers, such as departments and campuses. We analyze the information, compared to industry standards and practices, and make recommendations to help districts improve their technology functions. Additionally, Gibson provides data warehousing and visualization services that help school districts turn data into useful information for making data-driven decisions. Through our services, we help school systems make technology decisions that increase efficiency, improve user satisfaction, and save money.

Gibson’s Team

Below, we provide brief biographies of each member of our consulting team.

Greg Gibson, CPA

Mr. Greg Gibson is the founder and President of Gibson Consulting Group, Inc. He is one of the nation’s leading experts on school district efficiency. Possessing almost 30 years of experience, he has led over 200 school system efficiency studies for districts ranging from 500 students to over 600,000 students. He has directed a wide range of other projects in public education, including information systems selection and implementation, organizational analysis, process re-engineering, data integrity reviews, and program evaluations. Mr. Gibson has particular experience analyzing costs of virtual learning programs, as well as alternative instructional arrangements for special education, bilingual education, compensatory education, and gifted and talented education. Previously, he led the Management Consulting Services Practice for the Austin office of Coopers & Lybrand (now Price Waterhouse Coopers) – an international accounting and consulting firm. Mr. Gibson is a speaker and trainer on school district efficiency and performance-based budgeting at state conferences and conventions for school administrators and board members.

Ali Taylan, MBA

Mr. Ali Taylan serves as the Chief Information Officer for Gibson. He has consulted in school system performance and efficiency reviews as well as procurement department reviews. He assists clients to define software requirements as well as to develop and manage performance measures that improve

client efficiency and savings. Additionally, he possesses a strong understanding and vision for how business intelligence tools and technologies support all facets of educational operations. With over 15 years of experience, Mr. Taylan is an expert in management information systems and technology department assessments for school systems. He has worked with school systems and educational service centers to execute recommendations to improve the access to and use of management information systems that support decision-making. Mr. Taylan is also experienced in the development and implementation of business intelligence tools including data warehouse and data visualization. Mr. Taylan prides himself on his ability to serve as the bridge between the two complex worlds of business and technology.

Cheyenne Rolf, PMP

Ms. Cheyanne Rolf has over nine years of experience as an Associate Consultant at Gibson, working on a wide variety of projects – internal audits, program audits, efficiency reviews, accounting systems, program evaluations, cost savings, and performance measures. Ms. Rolf is a certified Project Management Professional. She serves as program manager for all of our recurring internal audit client projects. Ms. Rolf has a wide range of experience with internal audits, performance auditing, organizational analysis, and educational research. She has worked closely with senior consultants on all facets of school district projects, including the creation of performance measures, data analysis, detailed requirements gathering, school-level organizational analysis, staffing analysis, and data collection activities. She has managed projects ranging in size from 3,000 students to 300,000 students including serving as project manager for the Fairfax County Public Schools and Tucson Unified School District management and operational reviews and as assistant project manager for the Clark County School District management and operational review. Recently, she has served as the program manager for several of our internal audit projects including those for Caldwell ISD, Edgewood ISD, Fort Bend ISD, Hays CISD, Manor ISD, and Killeen ISD. Before working at Gibson, Ms. Rolf served as a grant manager for Texas school districts.

Elizabeth King, CPA

Ms. Elizabeth King has over three years of audit experience and is a certified public accountant. She possesses a Bachelor of Science in Accounting and Information Systems and a Bachelor of Science in Finance, both from Virginia Polytechnic Institute and State University. At Gibson, Ms. King helps Texas public school systems improve efficiency, effectiveness, and compliance through internal auditing. Her recent work includes internal auditing services for several Texas school districts, including Caldwell ISD, Edgewood ISD, Fort Bend ISD, Killeen ISD, Manor ISD, and Wharton ISD. Prior to joining Gibson, Ms. King was an auditor for RSM US LLP (formerly McGladrey, LLP), a large national CPA firm, where she conducted a wide range of audit projects of different sizes.

Joseph Shields, MBA

Joseph has nearly 20 years of experience in the fields of research and program evaluation with a proven track record of delivering quality reports based on rigorous methodological designs. He has directed or

co-directed several large-scale evaluation projects for Gibson. From 2005 to 2008, Mr. Shields served as Deputy Associate Commissioner for Grants and Evaluation at the Texas Education Agency where he oversaw the annual administration of approximately \$3 billion in state and federal grant funds to school districts. At the Texas Education Agency, he directed statewide evaluations of dozens of state and federally funded grant programs. Mr. Shields has many years of experience developing data collection and quality assurance processes. He was instrumental in the development of the 21st CCLC reporting system for the Texas Education Agency, and has developed quality assurance processes for numerous statewide and district-level evaluation projects at Gibson.

Amie Rapaport, PhD

Dr. Amie Rapaport possesses over 10 years of research experience in education and psychology. At Gibson, Dr. Rapaport has directed or co-directed a number of comprehensive research and evaluation projects. Prior to coming to Gibson, Dr. Rapaport led the Texas Education Agency's Program Evaluation Unit, supervising the development and execution of over 30 large-scale, statewide program evaluation projects. Dr. Rapaport has extensive experience guiding research; identifying key objectives; developing methodological designs; creating surveys; pinpointing and resolving methodological and statistical limitations; applying appropriate statistical methods; and interpreting and communicating results to diverse audiences. She is an expert in hierarchical linear modeling, structural equation modeling, and other sophisticated analytic techniques.

Jill Carle, PhD

Jill Carle, PhD, a research scientist at Gibson, holds a Ph.D. from Arizona State University in Political Science, with an emphasis in quantitative research methods. She received additional statistical and econometrics training at the University of Michigan. She has five years of research experience; extensive graduate and professional training in research design and econometrics; and experience working with large, longitudinal survey data. Prior to joining Gibson, she served as a research associate at the Pew Research Center where she was responsible for analyzing global trends survey data from more than 45 countries. In this context, she helped develop research questions and survey instruments, built advanced multi-level models, evaluated demographic patterns, and summarized key findings for publication. Dr. Carle is currently working on a variety of research projects at Gibson, including an evaluation of the 2010 Teacher Incentive Fund Project for the Region 18 Education Service Center, an evaluation of the Marzano Research High Reliability Schools Initiative in North Texas, an evaluation of the University of Virginia School Turnaround Program, and research related to how changes in higher education pedagogy in STEM courses may be impacting students outcomes.

Marshall Garland, ABD

Marshall Garland has almost 10 years of research experience, extensive training in research design and econometrics, as well as advanced training in categorical and limited dependent variable models. Prior to joining Gibson, Mr. Garland worked for the Texas Schools Project at the University of Texas at Dallas. As a research scientist there, he assembled longitudinal databases spanning 15 years and more than 60

million records. He used these databases to statistically examine questions related to students' academic growth, teacher effectiveness, and the impact of PD on student achievement, persistence, and graduation. Mr. Garland also served as a program evaluator at Austin Independent School District, where he evaluated a number of initiatives. Mr. Garland is an expert in hierarchical linear modeling, panel data analysis techniques, value-added modeling, and quasi-experimental research designs and methods. He is an advanced Stata programmer and SPSS user. He can discuss the details of research design, statistical methods, and results using nontechnical language to ease comprehension for a diverse audience. At Gibson, Mr. Garland serves as statistician and lead analyst on multiple projects, providing guidance and execution of sophisticated sampling plans and data analysis techniques.

Eric Booth, ABD

Mr. Booth has nearly 10 years of experience in the analysis and evaluation of educational programs and policies. He is the author of over 20 packages for the statistical package, Stata, that focus on the analysis or management of large-scale data. Mr. Booth's recent analysis and data management projects include the analysis of all the individual-level student records linked with all juvenile justice records in Texas from 1999 to 2010 in a report that received national attention called "Breaking Schools' Rules". Prior to coming to Gibson, Mr. Booth held a dual appointment at Texas A&M University as Senior Research Associate at the Public Policy Research Institute and Lecturer in Graduate Research Methods in the Department of Health Policy and Management. He has regularly taught graduate courses on data management with Stata, research methodology, and complex survey design. His peer reviewed publications include articles at the *Journal of Applied Research on Children, Party Politics, and Health Services Research*, and his educational research has been featured in various media outlets including the *New York Times*, *NPR*, *Washington Post*, *Houston Chronicle*, and the *Austin American-Statesman*.

Gibson's Experience

In the following pages, we provide examples of Gibson Consulting Group, Inc.'s (Gibson) project experience with school districts, education service centers, and state agencies in each of our services areas.

Gibson Consulting Group - Project Experience									
District / Client	Project	Year	Scope of Work						
			Management and Organization Review	Audit	Decision Support	Performance-Based Budgeting	Research and Evaluation	Survey Research	Technology
Abilene ISD, TX	Schedule Review	2010	<input checked="" type="checkbox"/>						
Amarillo ISD, TX	Smaller Learning Communities Grant Program	2009-14					<input checked="" type="checkbox"/>		
Amarillo ISD, TX	Vision 2020 Program Evaluation	2010-11					<input checked="" type="checkbox"/>		
Arlington ISD, TX	Payroll Audit	2013		<input checked="" type="checkbox"/>					
Arlington ISD, TX	Student Survey, Senior Exit Survey, and Training	2013-14						<input checked="" type="checkbox"/>	
Arlington Public Schools, VA	School Efficiency Review	2011	<input checked="" type="checkbox"/>						
Arlington Public Schools, VA	Finance Office Review	2013	<input checked="" type="checkbox"/>						
Austin ISD, TX	Cost Savings	2008				<input checked="" type="checkbox"/>			
Austin ISD, TX	Internal Audit Services	2012		<input checked="" type="checkbox"/>					
Austin ISD, TX	School for Young Men Feasibility Study	2012	<input checked="" type="checkbox"/>						
Austin ISD, TX	Board Reporting	2007-08	<input checked="" type="checkbox"/>						
Austin ISD, TX	Strategic Plan	2007-08	<input checked="" type="checkbox"/>						
Austin ISD, TX	REACH Program Evaluation	2009-10					<input checked="" type="checkbox"/>		
Austin ISD, TX	IDEA Allran Evaluation	2012-14					<input checked="" type="checkbox"/>		
Austin ISD, TX	Responsive Education Solutions Premier High School Evaluation	2012-14					<input checked="" type="checkbox"/>		
AVID Center	Study of AVID Program Impact for African American Males	2014					<input checked="" type="checkbox"/>		
AVID Center	Evaluation of the AVID College Completion Project	2013-19					<input checked="" type="checkbox"/>		
Beaufort County SD, SC	Accelerated Learning Evaluation	2010, 2012					<input checked="" type="checkbox"/>		
Bridgeport Public Schools, CT	Cost Savings & Efficiency Review	2010	<input checked="" type="checkbox"/>						
Burnet CISD, TX	Internal Audit Services	2012		<input checked="" type="checkbox"/>					
Caldwell ISD, TX	Internal Audit Services	2014		<input checked="" type="checkbox"/>					
Carlisle ISD, TX	Cost Savings	2010	<input checked="" type="checkbox"/>						
Center for Innovative Technology	Enrollment Patterns and Outcomes	2013					<input checked="" type="checkbox"/>		
Center for Innovative Technology	Growth Modeling and Testing	2012-14					<input checked="" type="checkbox"/>		
Clark County School District, NV	Educational and Operational Efficiency Review	2011	<input checked="" type="checkbox"/>						
Clear Creek ISD, TX	Software Requirements Study	2007							<input checked="" type="checkbox"/>
CNA Corporation	Regional Education Laboratory Appalachia Program	2012-14					<input checked="" type="checkbox"/>		
Comal ISD, TX	Internal Audit & Special Investigation	2008		<input checked="" type="checkbox"/>					
Comal ISD, TX	Special Education Review	2009	<input checked="" type="checkbox"/>						
Council for At-Risk Youth	Evaluation of CARY Intervention Programs	2013-14					<input checked="" type="checkbox"/>		
Dallas ISD, TX	Benchmark Evaluation of Financial Services	2013	<input checked="" type="checkbox"/>						
Deer Park ISD, TX	Software Requirements & Implementation	2008-10							<input checked="" type="checkbox"/>
E3 Alliance, TX	Data Informed Region; Early Childhood Business Planning	2011	<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Eanes ISD, TX	Technology Review & Plan	2009							<input checked="" type="checkbox"/>
Eanes ISD, TX	Internal Audit Services	2012		<input checked="" type="checkbox"/>					
Eanes ISD, TX	Taxable Value Audit	2013		<input checked="" type="checkbox"/>					
Eanes ISD, TX	Implementation of Our Audit Recommendations	2012-13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
Ector County ISD, TX	Technology Department Review	2007-08							<input checked="" type="checkbox"/>
Edgewood ISD, TX	Internal Audit	2015-17		<input checked="" type="checkbox"/>					
El Paso ISD, TX	Software Requirements Study	2008							<input checked="" type="checkbox"/>
El Paso ISD, TX	Process Analysis	2008	<input checked="" type="checkbox"/>						
El Paso ISD, TX	Budget Stakeholder Committee	2007, 2008				<input checked="" type="checkbox"/>			
El Paso ISD, TX	External Accounting, Auditing, or Legal Services	2012-13	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Fairfax County Public Schools, VA	Efficiency Review	2012-13	<input checked="" type="checkbox"/>						
Falls Church City Public Schools, VA	Efficiency Review	2013	<input checked="" type="checkbox"/>						
Fort Bend ISD, TX	Process Mapping and Re-engineering	2010	<input checked="" type="checkbox"/>						
Fort Bend ISD, TX	iAchieve Review	2013		<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
Fort Bend ISD, TX	CIO Selection	2013							<input checked="" type="checkbox"/>
Fort Bend ISD, TX	Internal Audit of Student Information System	2014		<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
Fort Bend ISD, TX	Internal Audit of Construction, Purchasing, Payroll, and SIS Follow Up	2015		<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>

Gibson Consulting Group - Project Experience									
District / Client	Project	Year	Scope of Work						
			Management and Organization Review	Audit	Decision Support	Performance-Based Budgeting	Research and Evaluation	Survey Research	Technology
Fort Bend ISD, TX	Internal Audit of Human Resources, Facilities Management, Safety and Security, and Purchasing Follow Up	2016		<input checked="" type="checkbox"/>					
Fort Bend ISD, TX	Annual Fraud Risk Assessment Audit	2012-13		<input checked="" type="checkbox"/>					
Fort Worth ISD, TX	Software Requirements Study	2007							<input checked="" type="checkbox"/>
Fort Worth ISD, TX	Special Interest Programs Evaluation	2009					<input checked="" type="checkbox"/>		
Fort Worth ISD, TX	Dashboard	2014					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Fort Worth ISD, TX	Reports Review and Synthesis	2014					<input checked="" type="checkbox"/>		
Grand Prairie ISD, TX	Cost Savings	2008				<input checked="" type="checkbox"/>			
Grand Prairie ISD, TX	Technology Department Evaluation	2013							<input checked="" type="checkbox"/>
Grand Prairie ISD, TX	Internal Audit	2008-09		<input checked="" type="checkbox"/>					
Grand Prairie ISD, TX	Performance Measurement System	2008-09				<input checked="" type="checkbox"/>			
Granger ISD, TX	Financial Investigation	2007-08		<input checked="" type="checkbox"/>					
Hallsville ISD, TX	Student Transfer Study	2014	<input checked="" type="checkbox"/>						
Hallsville ISD, TX	Taxable Value Audit	2014		<input checked="" type="checkbox"/>					
Hallsville ISD, TX	Performance-Based Budgeting	2010-11				<input checked="" type="checkbox"/>			
Hallsville ISD, TX	Internal Audit and Cost Savings	2010-14	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
Hanover Public Schools, VA	School Performance Review	2010-11	<input checked="" type="checkbox"/>						
Hays CISD, TX	Risk Assessment Services	2013		<input checked="" type="checkbox"/>					
Hays CISD, TX	Bilingual Audit	2015		<input checked="" type="checkbox"/>					
Hays CISD, TX	Human Resources Audit	2014		<input checked="" type="checkbox"/>					
Hays CISD, TX	Lehman High School Activity Fund Audit	2014		<input checked="" type="checkbox"/>					
Hays CISD, TX	Academic Program Management Review	2014	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	
Hays CISD, TX	Print Shop Review	2013-14	<input checked="" type="checkbox"/>						
Hays CISD, TX	Facilities Audit	2016		<input checked="" type="checkbox"/>					
Hutto ISD, TX	Cost Savings	2008				<input checked="" type="checkbox"/>			
IDEA Public Schools, TX	Finance Consulting & Interim CFO	2009		<input checked="" type="checkbox"/>					
IDEA Public Schools, TX	Human Resources Review	2009	<input checked="" type="checkbox"/>						
IDEA Public Schools, TX	Requirement Definition for Data Warehouse & Internet Portal	2009							<input checked="" type="checkbox"/>
IDEA Public Schools, TX	Performance Management Assessment	2008-09	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
IDEA Public Schools, TX	Cost Savings & Budget Development	2008-10	<input checked="" type="checkbox"/>						
Jefferson County SD, CO	Employee Survey	2010-11						<input checked="" type="checkbox"/>	
Judson ISD, TX	Internal Audit Services	2012		<input checked="" type="checkbox"/>					
Kamehameha Schools, HI	Software Requirements Study	2007							<input checked="" type="checkbox"/>
Katy ISD, TX	Change Management Project	2008	<input checked="" type="checkbox"/>						
Katy ISD, TX	SMS Software Requirements / Evaluation	2011							<input checked="" type="checkbox"/>
Kelton ISD, TX	Internal Audit	2013		<input checked="" type="checkbox"/>					
Kentucky DOE	Supplemental Educational Service Providers Evaluation	2010-12					<input checked="" type="checkbox"/>		
Killeen ISD, TX	Purchasing/Accounts Payable Audit	2014		<input checked="" type="checkbox"/>					
Killeen ISD, TX	Payroll Audit	2014		<input checked="" type="checkbox"/>					
Killeen ISD, TX	Taxable Value Audit	2014		<input checked="" type="checkbox"/>					
Killeen ISD, TX	Internal Audit of Special Education, MIS, and Human Resources	2016		<input checked="" type="checkbox"/>					
Leander ISD, TX	Technology Review	2010							<input checked="" type="checkbox"/>
Leander ISD, TX	Taxable Value Audit	2014		<input checked="" type="checkbox"/>					
Leander ISD, TX	Special Education Review	2009-10	<input checked="" type="checkbox"/>						
Lockhart ISD, TX	Food Services Review	2008	<input checked="" type="checkbox"/>						
Lockhart ISD, TX	Financial Investigation	2008		<input checked="" type="checkbox"/>					
Los Angeles USD, CA	Performance Measures and Budget Savings	2007-08	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		
Lufkin ISD, TX	Cost Savings	2010-11	<input checked="" type="checkbox"/>						
Lumberton ISD, TX	Cost Savings	2011	<input checked="" type="checkbox"/>						
Manor ISD, TX	Internal Audit	2014		<input checked="" type="checkbox"/>					
Manor ISD, TX	Performance Audit	2014	<input checked="" type="checkbox"/>						

Gibson Consulting Group - Project Experience									
District / Client	Project	Year	Management and Organization Review	Audit	Scope of Work				
					Decision Support	Performance-Based Budgeting	Research and Evaluation	Survey Research	Technology
Manor ISD, TX	Budget Analysis and Consulting	2015-16	<input checked="" type="checkbox"/>						
Manor ISD, TX	Transportation Consulting	2015-16	<input checked="" type="checkbox"/>						
Manor ISD, TX	Internal Audit of Human Resources and Follow Up Audit	2016	<input checked="" type="checkbox"/>						
Midland ISD, TX	Organization Study	2007	<input checked="" type="checkbox"/>						
Midland ISD, TX	Technology Department Review	2007							<input checked="" type="checkbox"/>
Midland ISD, TX	Curriculum Audit	2012-13	<input checked="" type="checkbox"/>						
Montgomery ISD, TX	Internal Audit	2008		<input checked="" type="checkbox"/>					
National Math and Science Initiative	Technology and Efficiency Services	2015							<input checked="" type="checkbox"/>
New Hampshire Department of Education	Statewide Parent Involvement and Post School Outcome Surveys	2013-14						<input checked="" type="checkbox"/>	
Nixon-Smiley ISD, TX	Facilities & Food Services Review	2008	<input checked="" type="checkbox"/>						
Oregon Department of Education	Evaluation of Oregon Statewide System of Support	2011-13					<input checked="" type="checkbox"/>		
Pasadena USD, CA	Management Audit, Facilities Review	2007	<input checked="" type="checkbox"/>						
Pearson	Student Growth Percentile Consulting	2012					<input checked="" type="checkbox"/>		
Pflugerville ISD, TX	Organization Study	2007	<input checked="" type="checkbox"/>						
Pflugerville ISD, TX	Cost Savings	2009	<input checked="" type="checkbox"/>						
Pflugerville ISD, TX	Internal Audit	2009-13		<input checked="" type="checkbox"/>					
Region 3 Educational Service Center, TX	Strategic and Business Planning Services	2014	<input checked="" type="checkbox"/>						
Region 6 Educational Service Center, TX	Business Planning Services	2013	<input checked="" type="checkbox"/>						
Region 6 Educational Service Center, TX	Follow On Work for Business Planning Services	2013-14	<input checked="" type="checkbox"/>						
Region 7 Education Service Center, TX	DMAC Review and Enhancements	2009-11			<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
Region 9 Education Service Center, TX	TESCCC Bylaw Review	2012	<input checked="" type="checkbox"/>						
Region 9 Education Service Center, TX	Multi-Regional Purchasing Cooperative Efficiency Study	2014	<input checked="" type="checkbox"/>						
Region 9 Education Service Center, TX	Purchasing RFP Assistance	2014	<input checked="" type="checkbox"/>						
Region 10 Education Service Center, TX	Audit of McKinney Vento Project	2009-10		<input checked="" type="checkbox"/>					
Region 13 Education Service Center, TX	Shared Services Agreement Review	2008					<input checked="" type="checkbox"/>		
Region 13 Education Service Center, TX	Requirements Definition	2009							<input checked="" type="checkbox"/>
Region 13 Education Service Center, TX	Evaluation of Technology Tools	2010							<input checked="" type="checkbox"/>
Region 13 Education Service Center, TX	Business Process Review	2014	<input checked="" type="checkbox"/>						
Region 13 Education Service Center, TX	Internal Audit of Purchasing and Finance	2014		<input checked="" type="checkbox"/>					
Region 13 Education Service Center, TX	Supplemental Educational Service Providers Evaluation	2008-11					<input checked="" type="checkbox"/>		
Region 13 Education Service Center, TX	Texas Turnaround Initiative Evaluation	2010-11					<input checked="" type="checkbox"/>		
Region 13 Education Service Center, TX	Regional Day School Program for the Deaf	2010-11	<input checked="" type="checkbox"/>						
Region 13 Education Service Center, TX	Assessment of TTIPS Grant Administration	2013-14					<input checked="" type="checkbox"/>		
Region 16 Education Service Center, TX	Training Module for Shared Service Arrangements	2008	<input checked="" type="checkbox"/>						
Region 18 Education Service Center, TX	External Evaluation of the 2010 Texas Teacher Incentive Fund Project	2014					<input checked="" type="checkbox"/>		
Region 20 Education Service Center, TX	Software Evaluation	2008							<input checked="" type="checkbox"/>
Robstown ISD, TX	Cost Savings	2012	<input checked="" type="checkbox"/>						
Robstown ISD, TX	Internal Audit Services	2012		<input checked="" type="checkbox"/>					
Rockdale ISD, TX	Efficiency Study	2014	<input checked="" type="checkbox"/>						
Schertz-Cibolo-Universal City ISD, TX	Curriculum Review	2008					<input checked="" type="checkbox"/>		
Schertz-Cibolo-Universal City ISD, TX	Special Education Review	2015	<input checked="" type="checkbox"/>						
School District of Lee County, FL	Community Survey	2011-12						<input checked="" type="checkbox"/>	
SEDL	Regional Education Laboratory Southwest Program	2012-13					<input checked="" type="checkbox"/>		
Sierra Blanca ISD, TX	Business Office Audit	2015	<input checked="" type="checkbox"/>						
Southwest Key Program	Technology Consulting Services	2013							<input checked="" type="checkbox"/>
Special School District of St. Louis	Operational Audit	2013	<input checked="" type="checkbox"/>						
Stafford County Public Schools, VA	Strategic Plan Development	2007	<input checked="" type="checkbox"/>						
TESCCC	Vendor Management; Technology Review	2010-11							<input checked="" type="checkbox"/>
Texas Association of School Boards	Internal Audit Services	2012		<input checked="" type="checkbox"/>					
Texas Association of School Business Officia	Data Warehouse and Web Interface Creation	2007-10							<input checked="" type="checkbox"/>

Gibson Consulting Group - Project Experience									
District / Client	Project	Year	Scope of Work						
			Management and Organization Review	Audit	Decision Support	Performance-Based Budgeting	Research and Evaluation	Survey Research	Technology
Texas Charter Schools Association	Customer Survey	2010	<input checked="" type="checkbox"/>						
Texas Charter Schools Association	Quality Framework	2010-11							<input checked="" type="checkbox"/>
Texas Education Agency	Evaluation of Statewide Accounting System	2007					<input checked="" type="checkbox"/>		
Texas Education Agency	Evaluation of Texas SUCCESS	2014					<input checked="" type="checkbox"/>		
Texas Education Agency	Evaluation of TX HS Completion and Success Grant	2005-07					<input checked="" type="checkbox"/>		
Texas Education Agency	Evaluation of 21st Century Community Learning Centers	2010-14					<input checked="" type="checkbox"/>		
Texas Education Agency	Evaluation of Texas Educator Effectiveness Metric	2012-13					<input checked="" type="checkbox"/>		
Texas Education Agency	Evaluation of the Educator Appraisal System	2012-13					<input checked="" type="checkbox"/>		
Texas Higher Education Coordinating Board	Evaluation of Advise Texas	2014					<input checked="" type="checkbox"/>		
Texas Higher Education Coordinating Board	Evaluation of Adult Completion Program	2010-13						<input checked="" type="checkbox"/>	
Texas Higher Education Coordinating Board	AVID Postsecondary Evaluation	2011-12					<input checked="" type="checkbox"/>		
Texas Higher Education Coordinating Board	Evaluation of Generation Texas Campaign	2013-14							
Town of Trumbull, Trumbull Public Schools,	Efficiency Study	2011-12	<input checked="" type="checkbox"/>						
Tucson Unified School District, AZ	Efficiency Audit	2013	<input checked="" type="checkbox"/>						
Tyler ISD, TX	High School Re-Organization	2007	<input checked="" type="checkbox"/>						
Tyler ISD, TX	ESL/Bilingual Program Review	2014	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		
Tyler ISD, TX	Performance-Based Budgeting and Measurement	2003-08				<input checked="" type="checkbox"/>			
Tyler ISD, TX	Special Education Department Review	2007-08					<input checked="" type="checkbox"/>		
University of Texas, Tyler, TX	Assessment of the PATSS Program	2014					<input checked="" type="checkbox"/>		
University of Virginia, VA	School Turnaround Program Evaluator	2014					<input checked="" type="checkbox"/>		
Uplift Education, TX	Performance Management Assessment	2008	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Uplift Education, TX	Systems Maximization	2009							<input checked="" type="checkbox"/>
Uplift Education, TX	Software Requirements / Evaluation	2009							<input checked="" type="checkbox"/>
Virginia Department of Education, VA	C(12) Report Consulting Services	2014					<input checked="" type="checkbox"/>		
Waco ISD, TX	Performance Review	2011-12	<input checked="" type="checkbox"/>						
Wharton ISD, TX	Internal Audit Services	2014		<input checked="" type="checkbox"/>					
Wimberley ISD, TX	Organization Study	2007	<input checked="" type="checkbox"/>						
Wylie ISD, TX	Internal Audit Services	2012		<input checked="" type="checkbox"/>					

Gibson Consulting Group's Efficiency Services Experience

As a part of efficiency services projects, Gibson has worked with over 100 different school districts. Since our firm is based in Texas, we have conducted efficiency services for several Texas districts. Below, we list some of those districts, followed by some brief project descriptions of our work with other Texas districts.

- Abilene ISD
- Carlisle ISD
- Comal ISD
- Fort Bend ISD
- Hallsville ISD
- Katy ISD
- Leander ISD
- Lockhart ISD
- Grand Prairie ISD
- Lufkin ISD
- Lumberton ISD
- Midland ISD
- Nixon-Smilely ISD
- Pflugerville ISD
- Uplift Education
- Waco ISD
- Wimberley ISD
- Willis ISD
- IDEA Public Schools
- Burnet Consolidated ISD

Rockdale Independent School District

Recently, Rockdale ISD hired Gibson to conduct an efficiency study of the district's student transportation, facilities maintenance, custodial services, and food services departments. Following our analysis of expenditures data, staffing data, operating procedures, and efficiency and effectiveness measures, we drafted a report that contained 13 recommendations which identified opportunities for improved efficiency; control weaknesses that, when corrected, will improve the district's cost performance; as well as other improvements in management practices.

Manor Independent School District

Manor ISD selected Gibson to conduct a performance audit, which involved extensive analysis of financial and staffing data, technology use, operating procedures, and efficiency and effectiveness measures. Our evaluation addressed every major element of school district operations including district organization and management, education service delivery, facilities management, human resources management, financial management, technology and management information systems, transportation, food services, and safety and security. Our report provided 59 recommendations for improvement, as well as commendable practices that the district employed at the time. Once fully implemented, these recommendations will result in a net savings of \$3.1 million over a five-year period.

Tyler Independent School District

Tyler Independent School District hired Gibson to streamline high school operations at its two high schools. Gibson redefined processes to better align them with existing technologies, recommended a redesigned office configuration to improve staff productivity and job sharing, and redefined job descriptions and skill requirements for new school office positions. We also assisted in the training and implementation of the new procedures.

El Paso Independent School District

El Paso ISD hired Gibson to conduct a staffing study of selected positions, including school administrators and support staff, as a part of its overall effort to reduce the operating budget. This study identified \$12.5 million in annual savings. Since this study, Gibson led the district's Budget Stakeholder Committee in identifying and evaluating additional savings opportunities for three consecutive years.

Austin Independent School District

Austin ISD, one of the largest urban districts in Texas, hired Gibson to conduct a high-level organizational study to better align its functions and establish appropriate spans of control. The project resulted in \$1 million in annual savings, as well as other recommendations to improve planning and accountability. Since this project, Gibson has evaluated performance monitoring at the board and district levels, aligning performance measures and planning processes under a single strategic planning process.

Robstown Independent School District

Robstown ISD engaged Gibson to conduct an efficiency audit of auxiliary staff levels. We collected and analyzed multiple years of financial data, staffing data, and other operating statistics. We interviewed Robstown ISD management and staff and visited campuses. We also made comparisons of Robstown ISD

to peer districts and to industry standards. Gibson's report provided nine recommendations that if implemented would result in recurring annual savings of over \$100,000.

Burnet Consolidated Independent School District

Burnet Consolidated ISD engaged Gibson to conduct a targeted study of auxiliary staffing in the district including facilities, grounds, maintenance, food services, transportation, and clerical staffing. We collected and analyzed multiple years of financial data, staffing data, and other operating statistics. We conducted interviews with Burnet Consolidated ISD management and made comparisons to peer districts in the state and to industry standards. We identified five areas with potential for quantifiable cost savings, which represented a potential savings of \$500,000 per year, with additional savings potential in the long term.

In addition to our work directly with school districts, Gibson has provided efficiency services for Texas regional and state educational agencies. We provide project descriptions for some of those projects below.

Education Service Centers of Texas

Our firm worked directly with the 20 ESCs of Texas over a six-month period to conduct a self-assessment of efficiency and performance. This work resulted in major changes at individual ESCs, as well as several ESC statewide initiatives. Site visits were conducted at each ESC, and the work was coordinated with the Texas Education Agency.

Texas Legislative Budget Board

The Texas School Performance Review program, launched in 1991, focuses on promoting better elementary and secondary education in the state through improved school district management and cost efficiency. While the Texas Comptroller of Public Accounts started the program, the Legislative Budget Board now manages it. Gibson has conducted school system performance audits at 20 public school districts for both the Texas Comptroller's Office and the Legislative Budget Board under this program. On each engagement, we used a standardized methodology, subjecting 12 different functional areas of each school system's operations to review in order to identify areas where each school system could achieve cost savings.

We evaluated each area for efficiency and effectiveness. We identified annual cost savings of up to 10 percent of the annual general fund operating budget. Districts reviewed have ranged in size from 250 students to almost 200,000 students.

Region 7 ESC Efficiency Program

Gibson conducted efficiency studies for two school districts as part of a region-wide program to improve efficiency in Region 7. Under this program, Gibson's fees were contingent upon the identification of savings. Additionally, district leadership had to validate the savings as practical opportunities. This no-risk opportunity provided districts that were strapped for funds with an opportunity to get outside help.

Outside of Texas, Gibson has worked with several school districts on large efficiency studies. Below, we provide brief project descriptions for some of these.

Tucson Unified School District

Tucson Unified School district selected Gibson to conduct a comprehensive efficiency audit. The scope of the project included all non-instructional areas, as well as academic program management and school operations. This \$300,000, five-month study contained 62 recommendations to improve efficiency and effectiveness, and also noted several areas where the district was operating efficiently. The major recommendations included an overhaul of the human resources function, development of district-wide efficiency measures, implementation of an internal audit function, streamlining of the teacher hiring process, centralizing the management of the custodial function, implementing energy conservation measures, purchasing new bus routing software, and re-engineering administrative processes. Five-year net savings were estimated at \$37 million, with net annual savings reaching 10.8 million by 2018-19.

Los Angeles Unified School District (LAUSD)

LAUSD – the nation’s second largest public school system – contracted with Gibson to identify cost savings to help bridge a projected budget gap of over \$150 million. Gibson analyzed financial and staffing data. We worked with department heads to identify and evaluate savings opportunities. We identified over \$65 million in savings opportunities, the majority of which related to position consolidation and reduction. We identified the savings during a four-month project timeframe with a project budget of \$250,000.

Concurrently with the cost savings work, Gibson helped LAUSD’s new Division of Accountability start the development of a performance measurement system for non-instructional functions. This involved the identification of specific performance measures, and the training of department heads and budget staff on how to analyze and interpret results.

Pasadena Unified School District

Pasadena Unified School District (California) engaged Gibson to conduct an organizational study, focusing specifically on how the school system made decisions. We also analyzed related support systems, such as organizational structure, communication and information systems, as well as the consistent application of policies in making decisions at the board, district, and campus level. The study, which we conducted for a Management Audit Advisory Council composed of district and civic leaders, recommended an overhaul of the decision-making framework and the implementation of new technologies to improve the communication of information relevant to decisions.

Since this engagement, Pasadena Unified School District hired Gibson to identify cost savings opportunities at lower levels of the central office. This \$50,000 study identified over \$1.2 million in savings.

Clark County School District

Clark County School District (Nevada) – the fifth-largest school system in the United States – selected Gibson from among six competing firms to conduct an Educational and Operational Efficiency Assessment Study. This \$900,000, three-month project involved the identification of major cost reduction opportunities, a review of the district’s budget process, development of a data dashboard prototype for performance measure tracking, and a review of educational programs and management.

Special School District of St. Louis

The Special School District (SSD) of St. Louis County selected Gibson to conduct an assessment of their management model for delivering special education services to students in 23 school districts throughout St. Louis County. This assessment included an evaluation of the organizational structure, roles and responsibilities of individual positions, and factors that influence the efficiency of the work performed by staff in those positions. We provided management recommendations related to process re-engineering, functional alignment of staff positions, information management, technology integration, staffing allocations, communications, and contracting aimed at improving the efficiency and effectiveness of the service delivery model for special education students. The SSD is a very unique special education organization in that it provides all special education services to school districts in St. Louis County, and does so with its own tax base and funding. Gibson also assisted SSD in the implementation phase of the project.

Bridgeport Regional Business Council

Gibson was selected among seven competing firms to conduct an efficiency study of Bridgeport Public Schools for the Bridgeport Regional Business Council in collaboration with the City of Bridgeport. The project included identification of specific savings opportunities as well as an overall assessment of operational efficiency and management effectiveness. Since this project, we have conducted a project to implement our recommendations in collaboration with Bridgeport Public Schools, the Regional Business Council, and the City of Bridgeport.

Illinois School Districts

Gibson conducted two comprehensive reviews in Joliet, Illinois for the Will County Chamber of Commerce. The business community was becoming increasingly concerned that the quality of education in the Joliet area was driving business to surrounding areas. The Chamber conducted two studies with the intent of turning the situation around. Both school systems were academically and financially distressed. Our recommendations resulted in significant cost savings, and led to the first successful tax referendum in 30 years.

We have also worked with state education agencies in other states on efficiency services programs for multiple school districts. Below, we provide project descriptions for two of those projects.

Virginia Department of Planning and Budget

Gibson participated in the first non-pilot year of then Governor Mark Warner's statewide program to improve efficiency in Virginia public schools. Gibson conducted the two largest school division reviews: Stafford County Public Schools and Spotsylvania County Public Schools. Most recently, Gibson completed reviews of Hanover County Public Schools, Arlington Public Schools, and Fairfax County Public Schools. Each of these reviews included evaluations of educational service delivery and operational areas. The purpose of the reviews was to identify savings that could be gained through best practices in

- Finance;
- Facilities;
- Organization;
- Transportation;
- Service Delivery;
- Human Resources;
- Technology Management;
- and other non-instructional areas.

These savings allowed divisions the ability to redirect administrative savings to the classroom.

Florida Office of Program Policy Analysis and Government Accountability

We have conducted three best financial management practices reviews for the Office of Program Policy Analysis and Government Accountability (OPPAGA) for Hillsborough County Public Schools, Collier County Public Schools, and Martin County Public Schools. A state law passed in 2001 subjects each school system to a review every five years until it obtains a Best Practices Seal by the Commissioner of Education. These reviews evaluated whether school systems applied the best practices adopted by the Commissioner. We included over 600 indicators of the best practices in the methodology. We have also worked with OPPAGA to refine its methodology over the years.

Gibson Consulting Group's Performance-Based Budgeting Experience

Below, we have provided project descriptions for three projects that involved performance-based budgeting.

Hallsville Independent School District

Gibson completed a performance-based budgeting contract with Hallsville ISD. Gibson tracked approximately 35 performance measures to monitor efficiency in operational areas as well as the schools. The work included the review and validation of data collected and the use of our data visualization tool to create a comprehensive dashboard that the district can use to inform the budgeting process. We also coached departmental staff on how to analyze and improve efficiency on their own.

Grand Prairie Independent School District

Gibson performed a cost savings study for Grand Prairie ISD, and later implemented performance-based budgeting at the school system so that they could identify additional savings opportunities on their own going forward. The project identified efficiency and qualitative performance measures for all non-instructional functions. We created a data visualization that displayed the performance measures and enhanced the analysis and reporting of measures. The district implemented all of our recommendations to save money, and used a portion of these savings to underwrite the investment in performance-based budgeting.

Tyler Independent School District

We developed a performance measurement system for Tyler ISD that addressed all areas excluding student performance. Gibson developed measures for district global performance, academic program management, facilities management, food services, transportation, financial management, human resource management, and technology, among others. Gibson developed this system interactively with Tyler ISD, with the goals of building an internal performance auditing capability and of changing the way the district budgets to a more performance-based approach. Our firm maintained the performance measurement system and assisted in data definition and collection, analyzing variances, identification of opportunities for improvement, and presenting results to the Board of Trustees.

Gibson Consulting Group's Internal Audit Experience

Caldwell Independent School District

Business Office Audit

Caldwell ISD engaged Gibson to conduct an internal audit of the district's business office including purchasing, accounts payable, payroll, general accounting, and business office technology. The audit involved interviews with business office staff, data analytics, and the testing of transactions to ensure compliance with board policies, administrative regulations, and district operating procedures. Recently, we completed the draft report.

Facilities Audit

Caldwell ISD engaged Gibson to conduct an internal audit of the district's facilities management function under the operations department. The audit included functional areas under the responsibility of the operations director, including maintenance and operations, grounds care, custodial services, and energy management. We collected and analyzed data and interviewed district leadership, school principals, and operations and maintenance staff. Recently, we completed the draft report.

Booster Club Audit

Caldwell ISD engaged Gibson to conduct an internal audit of three booster clubs. For this audit, we focused on the organization administration, transactional, and financial areas of the booster clubs. This work involved interviews with all booster club treasurers, review of internal and external guidelines and procedures, and data analysis. Recently, we completed the draft report.

Hays Consolidated Independent School District

Risk Assessment and Long-Range Audit Plan

Gibson performed a comprehensive risk assessment for Hays Consolidated ISD and developed the district's long-range audit plan, which has directed our recent audit work for the district.

Academic Program Management Audit

This audit focused on the management processes, school level practices, the automated tools, and the accountability mechanisms used to support the academic program at Hays Consolidated ISD. We analyzed six major areas of academic management including curriculum implementation fidelity, student data analysis and use, instructional resources and support, teacher observation and evaluation, teacher professional development, and academic program management and decision-making. Our approach involved the analysis and the triangulation of data from multiple sources including district-provided data, teacher surveys, interviews with central office staff, teacher and principal focus group sessions, and classroom observations. We also developed a data dashboard that compares 2013 STAAR passing rates at Hays Consolidated ISD to three benchmarks: the district average, the Region 13 average, and the state average. Our report presented six commendations and 19 recommendations for improvement to Hays Consolidated ISD.

Human Resources Audit

This audit focused on identifying opportunities to improve efficiency, to achieve cost savings, and to make recommendations for improvement management practices in Hays Consolidated ISD's human resources department. We analyzed nine major areas of the human resources department including overall human resources organization and management, compliance with laws and regulations, recruitment and on-boarding activities, off-boarding or issues concerning resignation procedures, employee discipline and evaluation, benefits management, position management, information technology, and compensation structure. Our approach to this audit involved the analysis and triangulation of data from multiple sources including district-provided data, interviews and focus groups sessions with administrators and staff whose daily work interacts with the district's human resources operations and functions, and interviews with staff assigned to human resources. We also held focus groups with teachers and principals. We conducted audit tests to corroborate key human resources processes, obtain evidence of documentation maintenance, and validate compliance with Hays Consolidated ISD board policy. Our report presented 17 recommendations for improvement to Hays Consolidated ISD. We also presented these findings to the board in person.

Lehman High School Cheer Activity Fund Audit

This audit focused on the organization administration, operational, transactional, and financial areas of the Lehman High School cheer activity fund. This work involved various staff interviews, a review of internal guidelines and procedures, and data analysis. This report presented seven recommendations for improvement to Hays Consolidated ISD.

Bilingual/English as a Second Language (ESL) Program Audit

This audit focused on the management processes, school level practices, automated tools, and the accountability mechanisms used to support the Bilingual/ESL program. Our review analyzed 14 different

areas of the Bilingual/ESL program management. Our approach to this audit involved the analysis and triangulation of data from multiple sources, including district-provided data, interviews with central office staff, teacher and principal focus group sessions, and classroom observations. This report presented seven recommendations for improvement to Hays Consolidated ISD.

Fort Bend Independent School District

Risk Assessment

Fort Bend ISD chose Gibson through a competitive proposal process to conduct an annual fraud risk assessment. Following our successful completion of the comprehensive risk assessment, Fort Bend ISD contracted further with Gibson to review the district's implementation of its iAchieve (i.e., iPad) program. We were also recently engaged by Fort Bend ISD to conduct the following audits:

Student Information Systems Audit and Follow-Up

Gibson conducted an audit of Fort Bend ISD's student information system. Our review covered policies and procedures governing the collection, processing, maintenance, and reporting of student information during the 2013 and 2014 school years. We also reviewed operations and controls related to the district's primary student information system, Skyward. The report presented 13 recommendations for improvement.

This year, Gibson conducted a follow-up audit of these recommendations. We reviewed all available documentation regarding Fort Bend ISD management's responses to the recommendations. We conducted a site visit to interview staff responsible for implementing the recommendations. We reviewed and verified the actions taken Fort Bend ISD in response to the recommendations. We also performed tests against Fort Bend ISD's data and systems to verify the district's progress with recommendations.

Construction Audit

Gibson conducted an internal audit of Fort Bend ISD's construction management function. This audit was different from a typical internal audit in that it was "preemptive," meaning the focus was more on what was expected to happen in the future as opposed to what happened in the past. The district wanted this audit to evaluate the district's readiness for a \$484 million bond program recently approved by voters. Procedures for this audit included the review of department organization, the bidding and award process, execution and administration of contracts, change order procedures, and budget control. The audit team evaluated applicable board policies and district procedures and controls for construction management, including management reporting. The audit also included a review of district processes to determine whether opportunities for efficiency improvements exist. We performed limited audit testing of historical construction projects to better understand current processes and to corroborate information obtained through interviews and document reviews. 11 recommendations resulted from this audit.

Purchasing and Accounts Payable Audit

Gibson conducted an internal audit of the purchasing and accounts payable departments for Fort Bend ISD. The audit involved interviews with purchasing department and accounts payable department staff

as well as data analytics and testing of transactions to ensure compliance with board policies, administrative regulations, and district operating procedures. Four commendations and 11 recommendations resulted from this audit.

Payroll Audit

Gibson is in the beginning stages of conducting a payroll audit for Fort Bend ISD.

In the past, we also worked with Fort Bend ISD on the following projects:

Financial Process Improvement

Fort Bend ISD engaged Gibson to document 14 financial processes. Through mapping sessions, Gibson produced a report, containing a list of additional necessary controls related to a process and potential process improvement opportunities.

Killeen Independent School District

Risk Assessment

Killeen ISD chose Gibson through a competitive proposal process to conduct an annual fraud risk assessment. Following our successful completion of the comprehensive risk assessment, Killeen ISD engaged us to conduct the following audits:

Facilities Management Audit

Killeen ISD engaged Gibson to conduct an audit of the district's facilities services department. The scope of this audit included functional areas under the responsibility of the executive director for facilities services, including maintenance and operations, grounds care, custodial services, and energy management. The audit approach involved the collection and analysis of data, interviews of Killeen ISD facilities services staff and district leadership, focus group sessions with school principals, school site visits, and transaction and compliance testing of certain Killeen ISD facilities operations. 10 recommendations resulted from this audit.

Purchasing and Accounts Payable Audit

Gibson conducted an internal audit of the purchasing and accounts payable departments for Killeen ISD. The audit involved interviews with purchasing department and accounts payable department staff as well as data analytics and testing of transactions to ensure compliance with board policies, administrative regulations, and district operating procedures. We are currently drafting the report. 22 recommendations resulted from this audit.

Payroll Audit

Gibson conducted an internal audit of the payroll department for Killeen ISD. This audit involved the process of paying employees after they have been hired. It did not include functions typically associated with human resources. We conducted interviews with all members of the payroll department, the superintendent, the chief financial officer, the chief personnel officer, the controller, the implementation specialist, the personnel services technician, and several members of the human resources department. We conducted data analytics and transactions testing to ensure compliance with

board policies, administrative regulations, and district operating procedures. 17 recommendations resulted from the audit.

Wharton Independent School District – Finance Office Audit

Wharton ISD engaged Gibson to conduct an audit of the district’s finance office. This audit focused on key financial processes and internal controls in purchasing and payables, payroll, general accounting, and the finance office technology. The audit involved interviews with finance office staff, data analytics, and transaction testing to ensure compliance with board policies, administrative regulations, and district operating procedures. Our final report resulted in several commendations and 33 recommendations to improve processes and to address findings from the audit.

Kelton Independent School District

Recently, Kelton ISD engaged Gibson to perform an internal audit for Kelton ISD, including reviews of payroll, purchasing, budgeting, cash handling/management, disbursements, activity funds, and general accounting procedures.

Manor Independent School District

Payroll Audit

Manor ISD engaged Gibson to perform an audit of the district’s payroll department. Through interviews with relevant finance, business services, payroll, and human resources staff; a review of documentation provided by the district (e.g., administration handbook and online board policy); and the testing of payroll transactions to audit Manor ISD’s process for paying employees after they have been hired. This report provided six recommendations for improvement.

Purchasing and Accounts Payable Audit

Manor ISD engaged Gibson to perform an audit of the district’s purchasing department and accounts payable function. This audit addressed the district’s processes of procuring and paying for goods and services from third parties. It included interviews with relevant finance, business services, accounts payable, purchasing, and accounting staff; a review of documentation provided by the district (e.g., administration handbook, online board policy, and purchasing manual); and the testing of purchasing transactions. This report provided seven recommendations for improvement.

We conducted an in-person presentation of the findings and recommendations of the payroll audit and the purchasing and accounts payable audit together for Manor ISD.

Hallsville Independent School District

Business Operations Audit

Hallsville ISD hired Gibson to conduct a business operations audit for the district. We audited all policies, procedures, and transactions associated with Hallsville ISD’s budgeting, accounting, payroll, and procurement processes. In doing so, we interviewed district staff to gain an understanding of the relevant organizational structures, current policies and procedures, and records and information systems in place. We reviewed the information systems’ set-up for the creation of requisitions, work-flow routing, approval for purchase orders, individual employees’ use of timekeeping, and processing

and payment of monthly and bi-weekly payrolls. We selected random samples of individual employees for the analyses. These procedures resulted in a report containing 13 findings and recommendations for improvement.

Cost Savings Project

Hallsville ISD hired Gibson to assist the district in implementing performance-based budgeting. Gibson helped Hallsville ISD develop a cost savings plan. Using the plan and our staffing analysis, we identified short-term cost savings, focusing primarily on savings related to auxiliary staff. We identified 14 recommendations.

Arlington Independent School District – Payroll Audit

Arlington ISD engaged Gibson to assist the district's Internal Audit department in conducting an audit of the district's payroll department. Gibson conducted interviews with supervisors and staff members in the payroll, human resources, and finance departments. We documented the processes for timekeeping, leave management, payroll processing, position management, fund disbursement, and account reconciliation. We performed tests on individual payroll transactions. Based on these audit activities and analyses, we developed a report containing five recommendations for improvement.

Austin Independent School District

Risk Assessment and Long-Range Audit Plan

In conjunction with the Austin ISD's Internal Audit department, Gibson performed a comprehensive risk assessment for Austin ISD as part of the pilot phase of TASB-Gibson. The project included over 40 interviews of AISD staff and members of the Board of Trustees. We assisted the Internal Audit department in developing its long-range audit plan and FY 2012-13 audit schedule.

Thanks to the successful completion of the risk assessment, Austin ISD contracted further with Gibson to help Austin ISD transition their internal audit function from its current narrow focus towards expanded services in fiscal year 2013, when we provided the following audits:

Construction Audit

For this audit, Gibson focused on the construction management group within Austin ISD's facilities department responsible for bond-financed new construction and major improvements or renovations of district facilities. Through our audit, we determined, among other determinations, whether Austin ISD's construction management had established comprehensive policies and procedures, was in compliance with applicable regulations, and had an effective system of controls in place. Based on the interviews with construction management staff and other analyses, we developed two recommendations for improvement.

Transportation Audit

For this audit, Gibson focused on Austin ISD's transportation department. We conducted financial analyses and peer comparisons to develop six recommendations in the state reporting and funding; vehicle security, maintenance, and replacement; fuel usage; personnel; and other areas of the transportation department.

Midland Independent School District – Curriculum Audit

Midland ISD contracted with Gibson to conduct a curriculum audit of the district’s English Language Arts and Reading and Spanish Language Arts and Reading core curricula. Our audit applied the *Teaching and Assessing for Learning* research-based professional standard of the AdvancED Accreditation Standards for Quality School Systems developed by the Council on Accreditation and School Improvement of the Southern Association of Colleges and Schools. Our audit utilized primary data sources (i.e., interviews, focus groups, surveys, and classroom observations) and secondary data sources (i.e., core curricular materials, organizations structure documents, monitoring plans, monitoring documentation, and professional development documents), and resulted in 12 recommendations in the following curricular areas: the context for curriculum implementation, curricular programs and interventions for struggling readers and English Language Learners, professional development, and curriculum monitoring. Our report also identified several immediate, mid-range, and long-term actions the district should take in those areas.

Eanes Independent School District – Budget and Payroll Processes Audit and Implementation

Eanes ISD engaged Gibson to perform audits of its budget and payroll processes. A larger than expected budget surplus in fiscal year 2012, changes in payroll procedures, and recurring errors identified in payroll processing prompted the audits. Among other findings, our audit identified the accounting and budgeting errors that increased the surplus by approximately \$2 million. Our report provided several recommendations for improving Eanes ISD’s processes. This project fostered such a good relationship with the district that Eanes ISD contracted further with Gibson to implement the recommendations made in our audit report.

Robstown Independent School District – Business Operations Audit

Robstown ISD engaged Gibson to conduct an internal audit of the district’s business operations including budgeting, purchasing, accounts payable, payroll, and student and campus activity funds. We collected operational and other data associated with each function. We conducted interviews with supervisors and business office staff. We documented the processes for requisition, purchase orders, cash disbursement, and student and campus activity fund management. We also performed numerous tests of individual purchases, approval, competitive bidding, overall fund disbursement, overall bank reconciliation, and fundraising activities. This report resulted in six recommendations for improvement.

Burnet Consolidated Independent School District – Business Processes Audit

Burnet Consolidated ISD engaged Gibson to conduct a comprehensive review of its key business processes, including purchasing and accounts payable, payroll, and campus and student activity fund management. This resulted in 17 recommendations for improvement.

Judson Independent School District – Risk Assessment and Long-Range Audit Plan

Judson ISD engaged Gibson to perform a comprehensive risk assessment and long-range audit plan. The final report was presented to the Board of Trustees. This project included interviews and focus groups with over 30 district managers and trustees.

Lumberton Independent School District

The Lumberton ISD Board of Trustees engaged Gibson to perform a targeted review of several areas of the district, including payroll processes, fund balances, grant accounting, and purchasing. Our report cited 16 recommendations for streamlining business processes and improving accountability. Following the report issuance, Gibson consulted with the district to guide the implementation of the recommendations.

Pflugerville Independent School District – Internal Audit Services

Pflugerville ISD engaged Gibson to provide complete internal audit services for the school district over a four-year period. Our work included a thorough, district-wide risk assessment. From this assessment, we developed annual audit plans to ensure that audits were performed on the higher risk areas of the district each year. We completed audits of campus and student activity funds, procurement and accounts payable, facilities operations, human resources, construction, and information technology.

Grand Prairie Independent School District – Risk Assessment

Grand Prairie ISD engaged Gibson to perform a comprehensive risk assessment of the district's departments and operations for the purposes of starting an internal audit program. The risk assessment document guided the activities of an in-house internal audit position created by the district.

Montgomery Independent School District – Purchasing Audit

Montgomery ISD requested that Gibson review its purchasing function after the retirement of its long-time chief financial officer. Our report to the Board of Trustees identified 22 critical issues to be addressed in order to improve internal controls over purchasing and the related information system.

Comal Independent School District – Internal Audit Services

Comal ISD, one of Texas' fastest growing school districts at the time, selected Gibson to provide internal audit services. The scope of services included reviews of processes in the areas of fixed assets (i.e., furniture, fixtures, and equipment); human resources and payroll; and student activity funds. Gibson provided Comal ISD with risk and control matrices for each area, as well as a final report of findings and recommendations for improvements in internal controls. As part of the internal audit program, Gibson also conducted a performance audit of the district's special education program.

Granger Independent School District – Food Service Operations Audit

Gibson completed an audit of the food service operations of Granger ISD. Concerned about mounting losses from its single cafeteria, the superintendent of Granger ISD asked Gibson to analyze revenues and expenses to determine the cause for greater losses from operations in the 2007 school year. Our report, issued in December 2007, indicated that numerous questionable practices and significant financial irregularities in the cafeteria over the previous two years suggested the possibility of fraud. As a result, one employee was dismissed and the matter was referred to the Williamson County District Attorney's office for further investigation.

Gibson Consulting Group’s Research and Evaluation Experience

Austin Independent School District

DAEP Evaluation

Austin ISD approved five Annual Academic Facilities Recommendations, one of which was the district-wide redesign of how Austin ISD handled discretionary student disciplinary offences. The new delivery model sought to reduce disciplinary actions overall, decrease disproportionate disciplinary actions, identify and support students with mental health service needs who were in the disciplinary system, and reduce recidivism into Disciplinary Alternative Education Programs (DAEPs). Austin ISD hired Gibson, Shore Research, Inc., and ICF International, Inc. to evaluate the redesigned discretionary removal model. With our partner firms, we collected summative feedback regarding the program’s implementation and impact, examined the fiscal impact of transitioning to a new model, and gathered formative evaluation data to help inform summative and financial analysis. Our evaluation team conducted and analyzed focus groups and electronic surveys with stakeholders to determine the extent of the new model’s implementation as well as to gather perspectives about the new model. We also analyzed student-level data files and program budget and expenditure data to assess outcomes and program costs, respectively.

Premier High School-Responsive Ed Evaluation

Gibson, Shore, and ICF International are currently evaluating the implementation and impact of Austin ISD’s partnership with Responsive Education Solutions to implement two Premier High School campuses in Austin ISD. Premier High Schools offer an alternative education setting to district students that emphasizes a personalized approach. Students complete course work during a four-hour school day in an environment with individualized pacing and computer-based instruction. The evaluation is designed to examine the implementation of these two independent campuses on two existing Austin ISD campuses, the impact of the partnership on participating students’ rates of credit accrual and graduation, and the relative cost of this program compared to other dropout prevention and dropout recovery programs in Austin ISD.

Amarillo Independent School District

Smaller Learning Communities Grant Program Evaluation

Gibson and the American Institutes for Research (AIR) conducted a comprehensive, five-year evaluation of a school redesign project at Caprock High School in Amarillo ISD. This project was funded through a federal Smaller Learning Communities Grant awarded to Amarillo ISD. As part of this grant program, Caprock High School implemented a grade-level house system where each of the four grades served by the school (i.e., 9, 10, 11, and 12) are located in separate buildings with their own house principals. The program also involved intensive professional development for teachers and other components intended to increase parent and community involvement. The research project utilized a mixed-method approach, which included annual site visits to Caprock High School (i.e., in-depth staff interviews and focus group sessions with teachers and students), staff and student surveys, and longitudinal analyses of student achievement data. Annual reports provided to the Caprock High School leadership team and Amarillo ISD served their formative evaluation needs. They used them to fine tune their approaches

related to school structure, communications, instructional practices, and overall grant program implementation. The evaluation team utilized an interrupted time series model to assess the impact of the smaller learning communities on student achievement results.

Evaluation of Vision 2020 Online Learning Program

Gibson conducted a comprehensive evaluation of Amarillo ISD's Vision 2020 (i.e., online learning strand) grant program. The primary goal of AISD's program was to provide staff development and technology-based resources and support that would increase the districts' technology content knowledge, and access to and use of technological resources. Through increased teaching capabilities and integration of additional technological resources and support into the classroom, the district goals were to increase students' enrollment in online courses, opportunities for meeting graduation requirements, and preparation for college-level coursework. The research approach included the collection and analysis of grantee progress reports related to program implementation milestones and professional development for administrators and teachers, online survey data (i.e., administrators, teachers, and students), and student-level outcome data (i.e., course enrollment, grades, and standardized test scores). This evaluation measured the fidelity of program implementation, the impact of the program on content knowledge and the instructional practices of high school teachers, the degree to which the program had impacted students' access to and use of online courses, and the impact of the grant program on student performance.

Fort Worth ISD – Evaluation of Special Interest Programs

Fort Worth ISD hired Gibson to conduct a comprehensive review of its Special Interest Programs (SIPs), or Career Pathways, in an effort to reconsider the district's next steps in terms of special programming. SIPs are specialized educational programs that provide students with innovative and creative course offerings tailored to their areas of interest, and toward career pathways. It is the goal of each program to offer a rigorous and relevant curriculum, which focuses on a unique theme or area of study. The Gibson team reviewed the district's current programming with the lens of current best practices applied, and provided recommendations for the district's future directions.

Uplift Education – Evaluation of Target Tech in Texas (T3) Collaborative Grant

Gibson completed a comprehensive, two-year year evaluation of the T3 grant program for Uplift Education, a Dallas-based charter school organization. The purpose of the Texas Education Agency's T3 grant program was to fund programs at local education agencies that would stimulate the use of educational technology to improve teaching and learning by providing 21st Century classrooms. The focus of the T3 grant program at Uplift included: 1) technology, networks, and technical support, 2) leadership, planning, support, and communication, and 3) online learning. In addition, the project created an online learning environment to allow for differentiated instruction and increased student participation in the use of technology to achieve learning standards. It also allowed for professional development for teachers in the effective use of technology and in how to transform their classrooms into 21st Century classrooms. A mixed-methods approach was used for this evaluation, which included collection and analysis of both qualitative (i.e., interviews and classroom observations) and quantitative data (i.e., grantee progress reports; administrator, teacher, and student surveys; and student

performance results). The evaluation measured the fidelity of program implementation, the impact on teacher and student comfort with and use of technology, and the impact on student outcomes.

Educate Texas – Texas STEM Regional Degree Accelerator

Gibson has partnered with RAND to provide analytic technical assistance and stakeholder engagement support to Educate Texas and the Helmsley Charitable Trust (HCT) in their joint effort to fund grants for two- and four-year regional higher education institutions in Texas. The goal of the grant program is to fund postsecondary programs designed to accelerate STEM degree production rates and to support regional STEM workforce needs. In the first phase of the project, Gibson and RAND provided research- and data-driven information to potential grantees in urban and rural regions across the state, so that those regional institutions may develop innovative strategies that, ultimately, produce significant gains in STEM degree and certificate production. Through multiple communication mechanisms—large and small workshops with partners and ongoing technical assistance—Gibson and RAND analyzed statewide and regional data on STEM degree pipelines and workforce needs to share with potential grantees. In the next phase of the project, RAND and Gibson will work with representatives from two- and four-year institutions to identify potential barriers to STEM workforce production in their regions and to help them propose innovative solutions to address these obstacles.

Legislative Budget Board – Evaluation of the Early Childhood School Readiness School Readiness Demonstration Projects and the School Readiness Certification System

Gibson and AIR partnered on a comprehensive evaluation of the Texas Early Education Model (TEEM) program that began in 2003 and the School Readiness Certification System that began in 2005 for the Legislative Budget Board. The evaluation examined the management and implementation of the TEEM program across the state, financial management of the program, student performance outcomes, and the operation of the School Readiness Certification Program. As part of this study, Gibson conducted a detailed analysis of program funding, expenditures, and financial controls in place at the State Center for Early Childhood Development at the University of Texas Health Science Center at Houston, more generally referred to as the Children’s Learning Institute.

Texas Education Agency

Evaluation of 21st Century Community Learning Centers

Gibson is currently partnering with American Institutes for Research (AIR) on a comprehensive statewide evaluation of after-school programs in Texas funded through the 21st CCLC grant program. The primary goals of the 21st CCLC program are to provide academic enrichment opportunities to at-risk students with the intent of improving student achievement scores, graduation rates, and college and career readiness. As a part of this quasi-experimental, mixed-method study, Gibson has led the qualitative data collection and analysis component. The Gibson team has completed site visits (i.e., interviews, focus group, and observations) to over 150 different 21st CCLC-funded after-school programs across the state of Texas to assess the variation in program quality across the state. The Texas study also involves surveys of site coordinators and staff members, and student achievement analyses involving treatment and comparison group students. This research design was selected to provide policymakers at TEA with

rich qualitative data related to variations in program quality and to test for program impacts through the use of hierarchical linear models, which were required due to the nested nature of the data.

Evaluation of Texas Students Using Curriculum Content to Ensure Sustained Success (SUCCESS) program

The primary goal of the Texas SUCCESS program is to provide public school students in Grades 3 through 8 with free online, adaptive programs (i.e., Istation Reading and Think Through Math) to help strengthen math and reading concepts and skills. For this evaluation, we employ a mixed-methods approach, including interviews with district and campus academic intervention staff as well as extensive analysis of online system usage, student growth, and student outcomes data. After matching students participating in the Texas SUCCESS program with comparable nonparticipating students, we used multi-level statistical models while controlling for prior achievement levels in math and reading as well as for other observable characteristics, to assess the impact of Istation Reading and Think Through Math on gains in state assessment scale scores for these two subject areas. A comprehensive evaluation report that triangulates data from qualitative data collection efforts and findings from the analysis of math and reading assessment gain scores has been delivered to the Texas Education Agency and is being reviewed by legislative subcommittees for policy consideration.

Annual Charter School Evaluation

The Texas Education Agency selected Gibson to conduct an evaluation designed to describe students attending nine open-enrollment charter school campuses, many of which were located in the Dallas area, to examine student performance, attendance, and behavior – and to measure students’ and parents’ satisfaction with their school. For this project, we administered a survey to all students attending those charter schools (in grade 6 or higher), a survey to parents of all students attending those charter schools, and a survey for principals of schools in the districts that lost students to the charter schools.

Evaluation of Texas Ninth Grade Transition and Intervention Program

The purpose of the statewide Ninth Grade Transition and Intervention (TNGTI) grant program was to improve student performance, ninth-grade retention, and high school completion by providing a summer transition program for academically at-risk incoming ninth-grade students, by implementing early warning data, and by providing interventions to students identified through that system. American Institutes for Research and Gibson used a quasi-experimental, mixed-methods research design to evaluate the TNGTI program including the collection and analysis of qualitative (i.e., taxonomy of grant application, interviews, focus groups, and classroom observations) and quantitative data (i.e., grantee progress report, teacher surveys, and student performance data). We used HLM statistical models to identify program effects, because of the nested nature of the TNGTI program implementation data (e.g., students within schools, nested within districts). The evaluation measured fidelity of program implementation, cost effectiveness, and impact on student outcomes. This design was selected to provide TEA with rigorous data on TNGTI program effects, so that TEA could make an informed decision regarding continued funding for the program. TEA used qualitative data collected through site visits to support the agency’s program improvement efforts.

Evaluation of the Texas Math, Reading, and Science Professional Development Program

Gibson and its research partners, the American Institutes for Research and ICF International, Inc., recently completed a large-scale evaluation of statewide professional development (PD) academies in Texas project with the University of Texas at Dallas' Education Research Center. This study, conducted for the Texas Education Agency, addressed the implementation of the PD academies provided to teachers through the regional education service centers and the degree to which the content-area specific (i.e., math, science, and English language arts) PD academies has an impact on teacher instructional practices, knowledge, and collaborative behaviors. The study also provided feedback to improve the quality and effectiveness of each PD program, and to determine the effectiveness of each program in positively affecting student achievement outcomes. A mixed-methods research approach was utilized, which included the use of expert content review panels, classroom observations of over 400 middle school and high school teachers using the CLASS observation tool, surveys of district and school leader surveys, teacher surveys, teacher PD participation data, and extant data related to teacher characteristics and student academic performance.

Humanities Texas – Evaluation of Teacher Institute Program

Gibson completed an evaluation of the Humanities Texas Teacher Institute Program. The program provides professional development to secondary-level humanities teachers in their first or second year of service in geographic areas with low student achievement on state assessments. The institutes will support teacher training and ultimately enhance student performance by broadening and deepening teachers' mastery of the humanities subjects they teach, providing teachers with effective and innovative pedagogical strategies as well as a wealth of instructional resources (e.g., facsimiles of historical documents and photographs, digital and online resources, and curricular guides), and enhancing teachers' ability to meet state curricular objectives and to transition to end-of-course exams. The evaluation examined the relationship between the professional development offerings and student performance, through the collection and analysis of teacher survey data and administrative data related to campus characteristics and student performance. Results are being used by Humanities Texas for formative program improvement and to broaden its scope to positively impact more teachers in Texas.

Texas Higher Education Coordinating Board

Evaluation of the Generation Texas Campaign

The THECB selected Gibson to conduct an evaluation of the Generation Texas Campaign, a public awareness campaign to promote increased awareness and knowledge of postsecondary opportunities and related processes (e.g., financial aid, college admissions, and Texas College and Career Readiness Standards) funded through the College Access Challenge Grant Program from the United States Department of Education. For this project, Gibson employed a mixed-method design which incorporated both qualitative and quantitative measures of program implementation and impacts – including interviews with Regional P-16 Councils' staff, surveys of program participants, surveys of website users, analysis of website usage patterns and social media activity (e.g., Twitter and Facebook). These efforts resulted in formative and summative feedback to the THECB regarding implementation and impacts of the Generation Texas program.

Evaluation of the Texas AVID for Higher Education Program

The THECB selected Gibson, and its research partner AIR, to conduct a comprehensive evaluation of the AVID for Higher Education program. Our mixed-methods design incorporated both qualitative and quantitative measures of program implementation and impacts, including interviews, focus groups, and surveys of staff and students in the program. Through interviews with staff participants, our evaluators obtained valuable information about program implementation including barriers, successes achieved, and staff's perceptions of what aspects of the program impacted teaching and learning at their institutions. We conducted focus groups with a sample of participating students at each participating school to learn more about students' experiences with the program. We also surveyed participating faculty and staff about the impact of AVID-related professional development on instructional practices and outcomes analyses related to student perceptions captured by the LASSI, student persistence rates, grade point average, and credit accumulation. These analyses examined whether differences existed on these measures between students who participated in the AVID program at the secondary level and similar students who did not participate. Gibson provided timely, informative, and accessible reports and briefings to the THECB, including formative and summative feedback regarding implementation and programmatic impacts.

Region 18 Education Service Center – Teacher Incentive Fund Evaluation

Gibson is conducting a comprehensive evaluation of the Texas Teacher Incentive Fund (TIF) grant. The Region 18 Education Service Center's Texas Center for Educator Effectiveness currently administers the TIF grant (2010) to approximately 37 schools in 12 districts in Texas. The Gibson research team is examining how well the grant was implemented in project schools during the five years of funding, including use of teacher evaluation systems, calculation of student growth metrics, and teacher understanding and knowledge of how teacher incentive awards are earned and distributed. This evaluation also seeks to examine how schools distributed funds over the five years, whether there were impacts on teacher mobility and/or attrition, and whether changes in student achievement were observed in TIF schools over the project period. Information learned from the evaluation will inform applications for future grant cycles, as well as implementation decisions at the local level for current and future project districts and schools.

Region 13 Education Service Center – Evaluation of Supplemental Education Services

Gibson conducted a statewide evaluation of Supplemental Education Service (SES) providers in Texas. Under No Child Left Behind (NCLB), schools receiving Title 1, Part A funding that have failed to meet critical performance targets and are thus in Stage 2 or higher of the School Improvement Program, must offer parents of economically disadvantaged students the option to enroll their child in after-school tutoring or other academic enrichment programs that are paid for by the Local Education Agency (LEA). Gibson was hired by Region 13 Education Service Center to conduct an evaluation of these SES providers. With over 100 SES providers serving as many as 180,000 eligible students across 1,200 school districts, Gibson developed a comprehensive research plan to determine the extent to which SES providers were effectively improving student performance in reading and math. The study involved the administration of paper surveys to parents, online surveys of involved school and district administrators, as well as analysis of student demographic, achievement, and tutoring intervention data for all

participating students. Through this evaluation, Region 13 Education Service Center was provided with formative and summative feedback regarding the quality and effectiveness of particular vendors' tutoring services that informed future decision-making regarding the approval status of SES providers.

Beaufort County Public Schools – Evaluation of the Accelerated Learning Schools Program

Beaufort County School District (BCSD) in South Carolina hired Gibson to evaluate the implementation and impact of the Accelerated Learning Schools (ALS) program in schools in need of improvement. The ALS program involved comprehensive school redesign efforts, including the implementation of more rigorous curriculum, project-based learning strategies, and instructional technology in every classroom. The redesign efforts also included an intensive coaching model and leadership changes at the ALS schools. The study involved in-depth case studies and cross-site analysis of three struggling schools – two elementary schools and one middle school – involved in an intensive transformation, or turnaround process. Data collection methods included interviews with the district leadership team, school leadership teams, coaches, and teachers; classroom observations; analysis of financial data related to the ALS program; and longitudinal analysis of school-level performance data. The study set out to identify the extent to which the schools were implementing the school turnaround strategies with fidelity and to identify promising practices in place at the study campuses.

Oregon Department of Education

Evaluation of 21st Century Community Learning Centers

Gibson partnered with the American Institutes for Research on a comprehensive statewide evaluation of after-school programs in Oregon funded through the federal 21st CCLC grant program. The primary goals of the 21st CCLC program are to provide academic enrichment opportunities to at-risk students with the intent of improving student achievement scores, graduation rates, and college and career readiness. As a part of this quasi-experimental, mixed-method study, Gibson conducted site visits to a diverse group of afterschool programs across the state of Oregon, which included interviews with site administrators and observations of academic and enrichment program offerings (scored with both the CLASS and SAPQA/YPQA observation tools). Our analysis provided Oregon Department of Education staff, system stakeholders, and after-school practitioners with critical information about practices associated with highly successful after-school programs.

Evaluation of the Oregon Statewide System of Support

Gibson conducted a multi-year, statewide evaluation of the Oregon Statewide System of Support (OSSS) for SIG-funded and other struggling schools in Oregon. The Initiative involves state-level coordination of School Improvement Grants. The mixed-method study design proposed by Gibson included interviews and focus groups at the state and regional levels; surveys of district coaches, school coaches, and school principals; and longitudinal analyses of student outcome data for schools served through the program, including 32 SIG-funded schools. Study objectives included a detailed assessment of statewide program implementation at all levels of the initiative (e.g., state, regional, district, and campus) and an impact analysis of how schools participating in the initiative improved over time as evidenced by student achievement scores and their status as schools in need of improvement.

Kentucky Department of Education – Evaluation of Supplemental Education Services

Gibson and the American Institutes for Research evaluated SES providers for the state of Kentucky. SES providers serve underperforming schools by providing tutoring support to economically disadvantaged students. For this project, Gibson assessed each provider via surveys of district staff, campus staff, and parents of tutored students. In addition, we conducted surveys of providers themselves to obtain input and perspectives from the tutoring companies themselves. We administered electronic surveys to 28 districts across the state and to 50 tutoring companies. We also administered paper surveys to parents of every student receiving SES services, approximately 9,000 parents. The Gibson team analyzed all of the survey data to determine an overall composite score for each provider in the state.

Regional Education Laboratory Grants

Gibson is a research partner on a federally-funded Regional Education Laboratories (REL) grant: the Southwest REL led by SEDL. Under this grant, Gibson participates in many different research and evaluation projects providing project management as well as data collection, management, analysis, and reporting services. Additionally, Gibson helps to facilitate multiple education stakeholder meetings each year in five states (i.e., Texas, Oklahoma, New Mexico, Louisiana, and Arkansas) for the Southwest REL which involves bringing together important education stakeholders (e.g., state education agency staff, educators, university researchers, special issue organizations, and program delivery staff) to create important, policy-relevant statewide research studies. Currently for the Southwest REL, we are also participating in studies of Texas Hispanic STEM and of New Mexico Pre-Kindergarten programs.

AVID Center – Evaluation of the AVID College Completion Grant Program

Gibson has begun work on a six-year, multi-state evaluation of the AVID for Higher Education (AHE) College Completion Grant Program funded through a grant with the Michael and Susan Dell Foundation (MSDF). The program includes 10 colleges and universities across the country where first year AVID-based supports are put in place for annual cohorts of AVID students who are exposed to AVID pedagogy, student learning communities, faculty-based advising, and other supports designed to improve student retention, performance, and ultimately graduation rates among low income and first generation college-going students. The study involves a comparison group design where we either randomly assign students to AVID treatment or control groups or match them to comparison group students through propensity score matching (PSM) procedures. Outcomes of interest in the study are student persistence, course grades, credit accrual, transfers to four-year universities (for two-year colleges), and degree attainment.

Virginia Department of Education

Ceiling Effects in Student Growth Percentile (SGP) Calculations

Gibson was chosen by the Virginia Department of Education and Pearson to examine the impact of state assessment ceiling effects on student growth calculations. Gibson researchers performed an array of intensive data analyses with large-scale, longitudinal student assessment records, including kernel density estimation, logistic regression, and quantile regression to better understand how test ceiling effects inhibit measurements of students' academic growth on standardized states assessments. The results of these analyses are being used by Virginia Department of Education policymakers to design

student growth reporting systems in a transparent and equitable manner. Gibson research staff has done substantial outreach and provided ongoing guidance to policymakers during this process.

Workforce Outcomes Project

The Virginia Department of education also hired Gibson to complete a research project for the Career and Technical Education (CTE) department. The research project studies CTE completers for five years after high school in order to learn about high school postsecondary enrollment and workforce outcomes for four or more years after high school graduation.

Gibson Consulting Group’s Survey Research Experience

Arlington Independent School District – Student Survey

For Arlington ISD, our research team developed surveys for students in grades 6, 8, 10, and 12 aligned to five of the districts’ key performance metrics defined in their strategic plan. Using innovative survey administration techniques, and working closely with school-level liaisons, our research team achieved a response rate of 83% of targeted students in the districts’ first year of survey administration, and an 88% response rate in Year 2. We used survey results to provide targeted recommendations to the district in the areas of quality of instructional practices, school environment, preparation for college and the workforce, quality of facilities, and school safety and respect. We also conducted trainings with principals of all three school levels (i.e., elementary, middle, and high) to discuss the effective interpretation and use of resulting data.

Texas Higher Education Coordinating Board – Adult Degree Completion Project

Gibson worked with the THECB to develop and administer surveys to adult students who had “stopped out” of college, earning a substantial amount of college credits without completing the bachelor’s degree. For this project, the Gibson team developed three unique survey instruments, each one specific to a different target population of interest. One of these efforts targeted users of the Grad TX website, the results of which informed targeted improvements and enhancements to the website’s design and functionality. Additional project activities included analysis of web usage statistics, which we examined in the light of outreach and media activities occurring over time. Through surveys, analysis of website usage statistics, and systematic user-testing, the evaluation team identified strengths and weaknesses in the Grad TX program’s outreach efforts, and provided recommendations to the THECB for improvements to outreach efforts and improvements to the Grad TX website.

New Hampshire Department of Education – Parent Involvement and Outcomes Surveys

Currently, Gibson works with the New Hampshire Department of Education to annually collect parent involvement surveys from approximately 33,000 parents of students with disabilities and post school outcome surveys from approximately 3,000 special education students one year after they have exited high school. In addition to survey research services, we are conducting training workshops to help the state’s employees and parents of students receiving special education services understand the results and identify opportunities for making targeted improvements. This year marks the second year of our administration of these surveys.

School District of Lee County – Community Survey

Gibson worked with Lee County on a large-scale community-wide survey assessing attitudes and opinions about student assignment approaches, quality of the District’s programs and services, preferences for expanded programs, and issues surrounding parent involvement. For this project, the research team combined multiple outreach efforts to obtain input from the community at large. Gibson disseminated 50,000 hard-copy surveys throughout the community, and 100,000 informational flyers containing a survey URL. The online version of the survey was made widely available, but also directly targeted to district staff, parents of existing students, and the business community. Gibson partnered with utility companies to advertise the survey campaign through customer invoices, and worked with community outreach offices to target under-represented groups. Over 10,000 open-ended survey responses were analyzed to contextualize the quantitative survey findings. Additionally, the research team developed a dynamic data visualization tool that graphically presents results from the survey, allowing in-depth examination of survey responses based on any demographic characteristic of interest.

Jefferson County Public Schools – Employee Workforce Conditions Survey

For Jefferson County Public Schools (JCPS), the largest school district in Colorado, Gibson analyzed survey data on employee satisfaction with workforce conditions. JCPS provided survey data from five time points over the past 12 years to the research team. Gibson provided both cross-sectional and longitudinal analyses, describing and presenting results for the current year, as well as examining trends over time to identify important patterns of change. These analyses revealed interesting patterns in employee attitudes on workforce conditions that highlighted a need for changes in targeted areas. Based on our experience providing consulting services in the educational sector, we provided targeted recommendations to improve employee satisfaction in key areas. Gibson delivered a dynamic data visualization tool to JCPS, enabling district leadership to browse through survey results at the construct, or item, level, and to slice mean scores by any of the demographic characteristics available for analysis.

Gibson Consulting Group’s Technology and Data Visualization Consulting Experience

Fort Bend Independent School District

Systems Selection

Fort Bend ISD engaged Gibson to complete a requirements definition study. The project deliverables included as-is process maps, a red flags report, a populated requirements database, a Request for Proposals for vendor software, and a vendor/software evaluation plan.

Review of iAchieve Program

Gibson conducted an in-depth review of the Fort Bend Independent School District’s iAchieve program. The iAchieve program was launched with the initial objective of developing a software platform and a wireless network for the delivery of interactive science curricula for 2nd through 8th grade levels at 14 Fort Bend Independent School District schools. Gibson’s review included interviews of over 25 Fort Bend Independent School District staff and contractors and encompassed financial, technical, and operational aspects of the program.

Chief Information Officer Candidate Review

Fort Bend Independent School District requested that Gibson assist the district in the screening, interviewing, and selection of a new district Chief Information Officer. Gibson reviewed candidate resumes, contributed interview questions, and participated in individual candidate interviews both on-site and by Skype.

Clear Creek Independent School District – Enterprise Resource Planning System

Gibson assisted Clear Creek ISD in preparing for the replacement of the district's current enterprise resource planning system. The major components of this work included conducting business process analysis, re-engineering, performing a needs assessment to identify system requirements, and developing a Request for Competitive Sealed Proposals (RFCPS) for software vendors. Our resulting recommendation was for the district to upgrade the current software, rather than procure new software.

Deer Park Independent School District – Enterprise Resource Planning System

Deer Park ISD chose Gibson to assist with the selection and implementation of their new enterprise resource planning system. Gibson provided the following services during this project: requirements development, process mapping and analysis, RFP development, vendor response analysis, vendor demonstration planning and management, vendor recommendation, and implementation assistance related to human resources process analysis, system set-up, and report writing.

El Paso Independent School District – Enterprise Resource Planning System and Student Information System

El Paso ISD selected Gibson to assist in the selection of a replacement for its current enterprise resource planning system and student information system. Gibson performed a needs assessment, developed requirements, and developed the RFP. In collaboration with El Paso ISD, Gibson helped develop a short list of vendors. We evaluated the proposals in response to the RFP, providing El Paso ISD with a proposal evaluation report which El Paso ISD utilized in selecting their vendor.

Fort Worth Independent School District – Enterprise Resource Planning System and Student Information System

Fort Worth ISD chose Gibson to develop a procedure for the procurement of a new enterprise resource planning system as well as a new student information system. For this project, we performed a requirements analysis and RFP development as well as an analysis of proposals and a recommendation. Additionally, we advised the selection of certain vendors to perform demonstrations of their systems.

Hallsville ISD – Technology Department Review

Hallsville ISD hired Gibson to conduct a technology department review. We conducted interviews with technology department users and a focus group with principals. Our analysis revealed some decision-making and user communication issues within a technology department that was otherwise far ahead of most school districts.

Kamehameha Schools (Hawaii) – Enterprise Resource Planning System

Kamehameha Schools selected Gibson to perform the selection and implementation of their new enterprise resource planning system. Through interviews with functional staff, Gibson conducted a detailed analysis of the school system’s major business processes. We documented their enterprise resource planning system requirements, developed the RFP, evaluated responses to the RFP, conducted a gap analysis, and delivered a recommendation of which vendors Kamehameha Schools should select for their “short list”. Gibson coordinated and attended vendor demonstrations. We provided a final report with our final recommendation of which product should be selected to replace the existing system.

Katy Independent School District

Student Information System

Gibson provided Katy ISD with guidance and assistance in selecting their student information system. Our highly-structured and proven approach included requirements analysis and RFP development, vendor demonstration planning and management, as well as comprehensive analysis and recommendation. Some examples of the requirements evaluated include scheduling, enrollment, discipline, attendance, special programs, health, and more. We used Technology Evaluation Centers, Inc.’s online decision support software, TEC Advisor for each step of the analysis. Our initial analysis produced a short list of vendors for Katy ISD, which we further analyzed through vendor demonstrations, client references, market data, as well as functional and technical requirements gathering. We weighted our findings according to the specifications provided by Katy ISD and provided a final vendor recommendation. Katy ISD believed our recommendation very successful; Kerry Rampelli, Senior Project Manager for Enterprise Applications at Katy ISD, even provided the following quote for a case study on the project, “It has been so beneficial for us to have every aspect of the process scored and input into software that can quickly provide a breakdown with clear results that we can analyze as a leadership team, as well as present to our Board and Superintendent”.

Enterprise Resource Planning System

We conducted an enterprise resource planning system selection for Katy ISD, using the same methodology described above for the student information system project.

Midland Independent School District – Technology Department Review

Midland Independent School District engaged Gibson to conduct a high-level review of technology services within the school district’s Technology and Information Management Department. Gibson conducted interviews with technology department staff members and other key stakeholders. They also reviewed organizational charts, policies, procedures, and other documents related to the technology function at Midland Independent School District. Their review identified 16 total technology-related issues in the areas of strategy, organization, infrastructure, technical support, professional development, policies, and procedures which Gibson presented to the school district.

Ector County Independent School District – Technology Department Review

Ector County Independent School District engaged Gibson to conduct a high-level review of the school district’s technology function, including the department of Technology and Information Management

and the status of instructional technology integration at the campus level. The review included interviews of technology department staff members and focus group discussions with technology users and other key stakeholders. Gibson also reviewed organizational charts, policies, procedures, and other documents related to the technology function. Their review resulted in five recommendations which they presented to the school district.

Grand Prairie ISD

Performance Accountability System

For Grand Prairie ISD, Gibson developed a performance accountability system for non-instructional areas; this system integrated performance measures into the budget process. Previously, Gibson had created performance measures for the district. In that work, we conducted management and staff interviews; defined the data collected for selected measures; collected and validated that data; conducted variance analyses; created a business information environment in Microsoft ProClarity for displaying measures; and delivered an executive summary which documented each measure in a clear and detailed manner.

Technology Department Review

Grand Prairie Independent School District engaged Gibson to conduct a comprehensive review of the Technology Services department. This analysis included a complete review and evaluation of the district's technology services and organizational structure. Gibson's team reviewed existing documentation and interviewed various technology staff individually in order to review their areas of support. Gibson also interviewed senior district leadership and department heads in order to understand the technology function from a leadership point of view. Gibson's final report included 21 findings and 22 recommendations across the various areas covered by the review.

Texas Association of School Business Officials (TASBO) – eFacts+

For TASBO, Gibson upgraded a comprehensive statewide student, financial, staffing, and demographic database – called Financial Analysis and Comparison of Texas Schools (FACTS) – to include data visualization tools accessed through the Internet. Prior to the project, FACTS – an Access database – contained a 10 year history of education data for 1,242 school districts, campus, and charter school in the State of Texas. Gibson transformed the data to fit into an MS SQL database. We built the cubes and related data structure, created views from which users and researchers begin their analysis, and prepared the information for access through the Internet. This upgraded business intelligence tool – eFACTS+ – provides multi-dimensional online analytical processing (OLAP) functionality in a fully accessible web-based environment, which helps school systems' analysts easily analyze performance trends via a researcher-friendly interface fit for the casual and power user. Since the upgrade, Gibson has provided further eFACTS+ enhancements as well as training.

Region 7 Education Service Center – Technology Review

Region 7 Education Service Center (Region 7) engaged Gibson to conduct a review of the information technology services function within Region 7's Technology Department. Gibson conducted on-site interviews with the technology staff and leadership team, conducted detailed analyses, and developed a final report in PowerPoint. Gibson's review resulted in 16 findings and recommendations.

Region 13 Education Service Center

Socrates

Gibson assisted Region 13 – who provides services for 60 districts in Texas, as well as nationwide – in the development of Socrates, a student performance data analysis tool that incorporates standardized test scores, accountability rankings, and other educational data. Together Gibson and Region 13 extracted, transformed, and loaded the education data into an MS SQL database. As Region 13 identified data sources for inclusion, Gibson extracted them and transformed the data to fit into our “star database schema” before loading the data into the database. Gibson built cubes and dimensions around that data. Utilizing MS SQL and ProClarity, Gibson developed sample reports and views. We designed and defined the graphics configuration as well as the stratification and drill-down tools that support efficient data analysis. We presented the samples to Region 13 management in a clear and easily-understood manner via PowerPoint. Our work helped Region 13 replace overly-detailed reports that were difficult to understand and use with a better, more efficient and researcher-friendly experience. Additionally, Gibson trained Region 13 staff on ProClarity and MS SQL.

Technology Review

Region 13 Education Service Center (Region 13) engaged Gibson to conduct a review of Region 13’s information technology support services. Gibson conducted on-site interviews with the technology support staff, user groups, and the leadership team. Gibson also conducted detailed analyses and developed a final report in PowerPoint. Gibson’s review resulted in 10 findings and recommendations.

Southwest Key Programs – Technology Operations and Governance Review

Gibson worked with members of the True North Consulting Group team to complete an operations and governance review for Southwest Key Programs, a national non-profit providing education, shelters, and alternatives to incarceration for children. Gibson participated in the evaluations of technology staffing, management, help desk, budget, backup, business continuity, disaster recovery, external contracts, and planning. Gibson conducted interviews with key staff at Southwest Key Programs, analyzed data, and developed the report that helped Southwest Key Programs learn whether the information technology department focused its efforts in the right areas from management, program personnel, and end-user perspectives.