



# INTENTIONAL MATTERS, LLC

STRATEGIC CONSULTING | EDUCATION, RESEARCH & EVALUATION,  
INSTRUCTIONAL TECHNOLOGY, LEADERSHIP DEVELOPMENT

## STEVE KUTNO, PH.D.

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## NANCY TEED

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**SUPERINTENDENT OF SCHOOLS • TUXEDO UNION FREE SCHOOL DISTRICT •  
ROUTE 17 • TUXEDO PARK, NY 10987**

**DELIVERED VIA EMAIL: [NTEED@TUXEDOUFSD.ORG](mailto:NTEED@TUXEDOUFSD.ORG)**

April 3, 2018

Dear Nancy Teed,

I am writing in response to the Tuxedo Union Free School District (Tuxedo UFSD)'s Request for Proposal for educational consulting services to evaluate and examine the conditions for maintaining the George F. Baker High School and/or explore the viable options for current and future enrollees. I am familiar with both the circumstances that contributed to this request as well as the socio-political climate in which it is made. Just about four years ago, I completed the report on behalf of my former employer, Public Consulting Group that included three interdependent ways in which to maintain and grow enrollment at GFBHS following the departure of the students of Greenwood Lake community. At that time, I led a team to examine community conditions and sentiment and to prepare viable models for the future. While the District made every effort to execute on all three recommendations, external forces converged to prevent the two recommendations most associated with increasing enrollment (i.e., converting to a charter school and inviting foreign, tuition-paying students).

Still, the GFBHS has transformed itself into a small STEM academy offering unique opportunities for the students and ensuring high quality, personalized learning. Nevertheless, enrollment tied to the size of the local community appears to be stalled. Therefore, I am pleased to submit a proposal to examine current economic, policy, and pedagogical realities influencing the most effective and efficient ways in which to meet the needs of students in grades 9 through 12.



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I appreciate the opportunity to participate in the RFP and to reengage with the Tuxedo UFSD on shaping a pathway forward. I recognize that this is a politically charged effort with strong opinions for the various possible options. After completing the analysis of the circumstances, I will be prepared to have the honest conversations about the options identified in the RFP. Moreover, I will be in a position to make an unbiased recommendation as to the direction that will best serve the students and community.

Sincerely,

A handwritten signature in black ink that reads "Stephen Kutno". The signature is fluid and cursive.

Steve Kutno, Ph.D.  
Intentional Matters, LLC



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## 1. Description of Consulting Company

### a. *Brief History and Overview of Services Offered*

#### Intentional Matters, LLC

Intentional Matters, LLC (IM) was established in September 2017 by Steve Kutno, Ph.D. to provide direct services to organizations (e.g., schools/districts, not-for-profits, commercial entities, etc.) in the areas of strategic planning, initiative management, organizational change, leadership coaching, and research and evaluation. In naming the organization, I reflected on years of practice and working with systems to support organizational change. Frequently, outcomes did not align to expectations. Well-meaning organizations and individuals often times experience difficulties in execution and implementation. In the middle—somewhere between defining expectations and not realizing them—intent is lost. Therefore, IM was founded on the premise that organizations need to address the influencing factors that might reduce the pursued efficacies and efficiencies and be intentional about their approach. After years of building this work on behalf of and under the umbrella of larger organizations, I set out on my own.

Intentional Matters, LLC provides strategic advice in the development of education-related policies, programs, and products. Our group facilitators are adept at leading diverse teams and integrating disparate views through design-thinking activities. Intentional Matters is able to provide all aspects of quantitative and qualitative research, from planning methodologies to data collection and analytics. Current projects include support for school leadership and educators on expanding innovative instructional practices (e.g., problem-based learning) and support co-creation of next-generation facilities intended to influence students' higher order thinking, critical problem solving, and collaboration. Within this context, Intentional Matters plans and deliver professional learning experiences encouraging instructional transformations aligned with facility design and development for students, teachers, and parents. In addition, Intentional Matters has been working with educational technology firms to build models of blended learning that scale to meet the needs of students while increasing the performance of chronically underperforming students.

Additionally, in my capacity of working for others, I have led strategic planning projects, program evaluation projects, and various instructional and assessment initiatives (e.g., Literacy Across the Curriculum; Response to Intervention and Multi-Tier Systems of Support; reading intervention; 21<sup>st</sup> Century Learning; Problem-based Learning; etc.).



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## *b. Background of Consultants*

Dr. Steve Kutno completed his doctoral studies on the connections between state policy and classroom practices over twenty years ago. Since then, he has worked extensively with all levels of public education through grade 12 and on commercial endeavors in support of students and schools. Dr. Kutno worked on a number of projects with not-for-profit organizations. A former classroom teacher, Dr. Kutno has established a reputation for facilitating teams in exercises in self-discovery and planning; supporting the development of long-range plans, completing reviews of instructional facilities, and working on projects in literacy development, MTSS, technology in schools, and formative assessment.

## *c. Description of Similar Projects*

**Greenwich Public Schools, Greenwich, CT:** On behalf of PCG, Dr. Kutno completed a review of current conditions through extensive data collection and analysis. This information was the foundation upon which the development of their strategic plan was facilitated. The work included extensive outreach to the community, district personnel, and school board.

**Colorado Springs, District 11, CO:** On behalf of PCG, Dr. Kutno led an audit of the Comprehensive District Performance Plan, evaluating the Instructional, Financial, Technology, and Mill Levy Override (MLO) Plans. This biennial review assessed the effectiveness and ongoing alignment between components of the Plans to determine whether the MLO management program and structure maintain the original intent. Moreover, Dr. Kutno coauthored the report noting the dilution of funds as a result of inflation and increasing demands.

**Lenox Public Schools, MA:** On behalf of PCG, Dr. Kutno facilitated community conversations about the future of the public schools in a region in which demographic shifts were leading to declining enrollment. Working across the school community to identify areas of emphasis for the future of the district helped to shape a series of work plans to accomplish short and long-range goals. The community remained divided on how best to address the declining enrollment. At the time, an increasing number of students from outside the district were enrolled at a discounted rate (relative to cost) as established by the MA Department of Elementary and Secondary Education School Choice Program.

**Tuxedo Union Free School District, NY:** On behalf of PCG, Dr. Kutno led the team seeking to answer the question of how to maintain the viability of a high school in the event that two-thirds of the enrolled students would withdraw at the end of a 30 plus year partnership with adjacent K-8 district. Assessing local conditions and understanding community sentiment were essential to building possible pathways forward. Ultimately, three recommendations were put forth to help the school create a unique identity; pursue a conversion charter; and, if the circumstances were right,



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promote privately admitted students through a third-party. In addition, Dr. Kutno supported the development of the charter application, working closely with the lead applicants, local teacher union, and independent outsiders.

*d. References (3)*

Evelyn Novak, Superintendent of Schools  
School District 33, Chilliwack Public Schools  
8430 Cessna Drive  
Chilliwack, BC V2P 7K4  
(604) 792-1321  
[evelyn\\_novak@sd33.bc.ca](mailto:evelyn_novak@sd33.bc.ca)

Barbara O'Neill, School Board (Former Chair)  
Greenwich Public Schools  
(203) 536-6545  
[barbara\\_o'neill@greenwich.k12.ct.us](mailto:barbara_o'neill@greenwich.k12.ct.us)

Tim Lee, Superintendent of Schools  
Henry (Hank) Maimin, School Business Administrator  
Lenox Public Schools  
6 Walker Street  
Lenox, MA 01240  
(413) 637-5550  
[supt@lenoxps.org](mailto:supt@lenoxps.org)  
[hankm@lenoxps.org](mailto:hankm@lenoxps.org)

*e. Overview of Network Resources*

While, IM remains a small single shingle shop, I am able to draw on a network of other consultants, current and retired school administrators for support on this project as necessary. This includes experts in the areas of research and evaluation, alternative models of school, and policy.

Intentional Matters will partner with Research Perspectives and their principal Christopher Brown in support of the work to be completed as part of this project. Research Perspectives is a consulting firm specializing in research in the education space. Mr. Brown brings a wealth of experience in the areas of research design, development, and execution. He also is an expert at facilitating decision making based on data.



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## 2. Project Proposal

### a. Outline Plan (Activities) for Completing Project

#### i. Project Organization (Project Kickoff Meeting)

Each project must begin with a strong project plan, established around a set of mutually agreeable principles. The plan will be an extension of what is described here, inclusive of specific roles and responsibilities, dates in which activities will be completed, and expected participation of members of the Tuxedo UJFSD. During an initial meeting to confirm aspects of the project plan, specific expectations of success will be specified. By exploring expectations in advance, clarity of purpose and activities can be modified to ensure the successful completion of the project.

#### **Project Kickoff: Introductions, Project Plan, Goals and Purpose**

Principal and supporting consultants, superintendent, business manager, school board members, building administrators, others TBD

##### **Introduction: An Overview**

- Reviewing who TUFSD: Who are we and what do we stand for?
- Dream the end of this work; what does success look like?
- Balancing expectations of people with differing viewpoints
- Understanding the road to completion
- What will be completed in the coming days, weeks, months?
- Discuss public communications and expectations?

#### ii. Data Collection and Research

Unlike the previous project, during which we explored (1) community sentiment for maintaining GFBHS and (2) different viable options in which to pursue the community preferences, this project approaches the same problem from a slightly different perspective. In the previous project, the ask was to complete a comprehensive “analysis of the current district options and contingencies in recommending feasible and cost-effective solutions for this high school’s future.” The emphasis was on the future of the high school. Though not mutually exclusive, this project asks for options for “providing students in grades 9 through 12 with a comprehensive education, focusing on meeting student needs in an efficient cost-effective manner.” As such community sentiment, while important, is not integral to the findings. Therefore, the research described below excludes extensive community outreach.



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George F. Baker High School has enjoyed the benefits of being a small school among its much larger neighbors. The staff consistently know the students and their families. There is a bond among members of the community and there is an intimacy that is often lacking in large schools. Still, larger schools have the benefit of scale. They are able to offer broader and richer programming and extensive extracurricular, arts, and athletic opportunities. GFBHS was a small school even before the exit of the Greenwood Lake students. Today, four years hence, grades 9 through 12 enrollment hovers near where any one grade enrollment stood previously. The Tuxedo community is faced with a number of difficult choices. These choices, however, should not be made absent data to inform the many possible pathways.

The following research is meant to examine the option(s) that will best serve the needs of students in the context of the overall District and what the implications are for any one of these pathways. Specifically, Intentional Matters will examine each possible option to understand the pedagogical and personal impact of the students and families served and examine the financial and personnel implications to the Town and Board of Education.

## Research

### School Budgets

- Complete review of the GFBHS budget.
  - Number of students
  - Number of staff (FTE assigned exclusively to grades 9 through 12)
  - Overhead (Admin; capital; and retirement) divided among enrollees
  - Programmatic costs/expenses
  - State Aid and Budget Trends
  - Costs Associated with maintaining GFBHS
  - Costs associated with closing GFBHS
  - Total operating expenses per student
- Prepare comparison chart of relevant costs for each of the following districts (Monroe-Woodbury and Suffern Central School District)

### School Enrollment

- Enrollment Projections
  - Historical enrollment data absent the Greenwood Lake enrolled students
  - Projected enrollment absent and with the development of Tuxedo Farms

### Instructional Programming

- Current Curricular Options (Compared to surrounding schools)



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- Courses of study
- Pedagogical approach
- Understanding STEM vs. STEAM

### **Understanding Impact of School Size**

- Small school vs. Large School
  - In an effort to provide a balanced understanding, this will be a literature review highlighting the benefits and potential issues with each.
- Relationship between property values and schools
  - This qualitative review will look at how school choices influences potential home values. To the extent possible, it will look at how school size plays a role.

### **Exploring Options Students of GFBHS and Associated Cost/Benefit Analysis**

What are the features of a good learning experiences and outcomes for Tuxedo UFSD students?

- Maintain GFBHS as is (STEM Academy)
- Reimagine GFBHS
  - STEAM
  - Distance Learning
  - Other Models of Learning (move away from Carnegie Units: including implications with NYSED)
- Increase nonresident tuition paying students
- Examine the feasibility of relationships with surrounding districts
  - Meet with designated districts to determine interest and capacity in adding students
  - Review tuition options to one district
  - Review other possible arrangements (e.g., an overenrolled district might be interested in the physical space available at GFBHS)
  - Cost considerations
  - Impact on Tuxedo UFSD's NYSED Charter to operate a K-12 district)
- Tuition students to multiple districts
  - Cost considerations
- Other possible considerations and implications

### **Authoring the Report**

Intentional Matters will prepare a final report inclusive of all of the data listed above and identifying the academic/pedagogical and financial implications of each of the possible choices. Moreover, Intentional Matters will conduct feedback sessions with the Tuxedo



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UFSD leadership, School Board, and others as seen fit to ensure that the feedback is both honest and balanced.

This process will occur concurrently with the research above. Once the research is underway, report writing will begin. The final report, to be delivered in August, should not be the first-time vested individuals are seeing it. Ideally, there will be multiple iterations throughout the process. This is not to white wash or modify any of the recommendations, but to ensure that they are following a logical presentation of the data and that they are in language accessible to the entire community.

## Consultant Presentation to the BOE

A distilled version of the report will be prepared as short presentation to be made in a public-school board meeting. The presentation will be limited to about 15 minutes of presentation, allowing ample time for questions and answers with Board members.

### **b. Proposed Timeline and milestones, deliverables**

Start Date: Project Launch April 25 – May 4 (1 day onsite)

- Complete Project Plan
- Initial Data Forms

Research: April 30 – May 24 (dates were chosen to avoid conflicts with AP and Regents testing in June. Alternative dates are possible).

- Onsite working with superintendent and business administrator (2-3 days/week) to collect and review data
- Calls to NYSED to confirm rules regarding sending students out of district and impact on Tuxedo UFSD Charter.
- Data collection and visits to surrounding districts

Report Writing: May 7 – July 27

- Proposed Table of Contents (May 24)
- First Draft (June 30)
- Second Draft (July 16)
- Third Draft (July 30)
- Copy editing (August)
- Final Draft (August 31)

Presentation to School Board: (September 20, 2018)



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**c. Cost for project**

\$ 39,600

This is a fixed fee project based upon the scope provided within the RFP and this response. The fee includes all of the principal consultant's time, additional third parties requiring remuneration, and all travel associated with the project. Draft and final reports will be provided in electronic form. Upon contract execution, 40% of the price will be due to Intentional Matters, LLC. The next 40% will be due at the submission of the final report in August. The balance will be due in September whether or not a presentation is made to the Board.

**d. District Expectations (time, money, and resources)**

The primary expense to the district throughout this project will be access to various staff and resources to complete the research. Since this is not an attempt to re-imagine all the possible ways in which GFBHS might move forward and since perception data will play a minimal role, it won't be necessary to meet with all the staff or students. Nevertheless, they may have an interest in the work and its eventual outcome. As such, Intentional Matters will make one or more researcher available to hear feedback during one or more visits to the district. Primarily, Intentional Matters will need to spend extended time with the Superintendent and Business Administrator unpacking the necessary financial information and with adjacent districts to understand their appetite and ability to enter into a relationship with Tuxedo UFSD.