

# PROPOSAL

K12 Public School District Fiscal Health Analysis

For



# PERRIS UNION

## HIGH SCHOOL DISTRICT

Submitted April 15, 2024

## 1. LETTER OF INTRODUCTION

HYA is a network of independent education experts with 35+ years of experience in urban, suburban and rural districts throughout the country. The student enrollment in these districts ranges from less than 100 students to upwards of 640,000. Our Guiding Principle is: Every child has the fundamental right to equal educational opportunities no matter their race, socioeconomic status or geographic location. HYA's partners with school districts to recruit and develop great leaders, plan for the future, implement programs, and evaluate and audit the effect of its work on student achievement and other organizational measures. Through our numerous collaboratives, including executive search, strategic planning, operational excellence, executive coaching, safe learning environments, and program development, school districts partner with HYA to move critical projects and initiatives forward and provide subject matter expertise.

HYA is committed to exceeding the Perris Union High School's Board and Administration's expectations and would welcome the opportunity to work with you.

Sincerely, Nanci Perez, Chief Operating Officer



## 2. FIRM IDENTITY

HYA Corporation, dba Hazard, Young, Attea and Associates, has been in business for 35 years. It was reorganized as a C Corporation beginning January 2023. The founding owner is still involved in the firm.

Hazard, Young, Attea & Associates (HYA) and its principals, Partner(s) or manager(s) have not been involved in litigation or arbitration with any of its clients in our 35 years in business.

## 3. KEY PERSONNEL

HYA Associates are crucial in guiding school districts toward success by leveraging their experience and expertise. With a combination of analytical skills, leadership acumen, and a strategic mindset, our Associates are uniquely skilled to support school districts as they create the conditions for continuous improvement. HYA carefully selects teams of Associates who possess the needed expertise of the proposed project and the specific conditions within the District as those needs evolve. The project lead for this proposal is LaTanya Kirk Carter.

### **LaTanya Kirk-Carter**

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LaTanya Kirk-Carter is a retired K12 public school administrator having served 35 years in school business management. She has held positions in purchasing, facilities, and risk management. Ms Kirk-Carter served as an assistant superintendent of business services for districts in Orange County, Lawndale and retired from Beverly Hills. Ms. Kirk-Carter was called into service as

assistant superintendent of business services by the California State Superintendent for the distressed Inglewood Unified School District, but within a few months was made interim state administrator for receivership reporting directly to the State Superintendent. Ms. Kirk-Carter has conducted many fraud audits for districts in Los Angeles County and Riverside County resulting in eight felony convictions. Those convictions were obtained through close work with local law enforcement and the Los Angeles County District Attorney's office.

Ms. Kirk-Carter held positions on the California School Business Official (CASBO) Board Of Directors and served as its Legislative Committee chairperson and member for many years. She also served on many other CASBO and ACSA Committees.

Ms. Kirk-Carter holds a bachelor of science in rehabilitation counseling and a masters of business administration in organizational management. She is scheduled to complete the requirements for the Certified Fraud Auditor designation in the Spring of 2024.

#### **4. FISCAL HEALTH ANALYSIS - PROPOSED PROJECT PLAN AND APPROACH**

##### **Introduction:**

Efficient and effective operations are essential for the successful functioning of any educational institution. Perris Union High School District is committed to optimizing its operational processes to ensure maximum resources can be challenged to support its mission of drawing out the full potential in every student. To ensure alignment with best practices and identify areas for improvement, a Fiscal Health Analysis is proposed.

##### **Scope of Work:**

The Fiscal Health Analysis will encompass a comprehensive review of the following areas:

- All funds multi-year balances review and sources
- Audit and audit findings reviews (5 Years)
- Contract management, RFP, public bids, and purchase orders
- External checking account review and reconciliations
- Internal systems controls
- Multi year budget, ending balances and unaudited actuals review
- Enrollment trends and projections review
- Budget and reserve level guidelines and policies
- All funds revenue projections and reviews
- Associated Student Body (ASB) testing, systems and reviews
- Review and reconciliation of unrestricted and restricted cash allocations

## **Methodology:**

The Fiscal Health Analysis will utilize a combination of methods, including onsite inspections, document review/sampling, interviews with stakeholders, systems testing, data analysis, internal controls, and juxtaposition against best practices.

## **Deliverables:**

Upon completion of the Fiscal Health Analysis, Perris Unified School District will receive the following deliverables:

- Comprehensive Report outlining findings, observations, and recommendations for improvement in each operational area.
- Action Plan detailing specific steps and responsibilities for implementing recommended changes and addressing identified inefficiencies.
- Recommended Training and Professional Development Workshops for staff members involved in operations management to enhance skills and knowledge in areas requiring improvement.

## **Additional Optional Services:**

Should the District wish further analysis/audits in its business operations, HYA can offer audits in the following areas for a separate project cost and detailed in an addendum:

Fraud; payroll; attendance; payroll; benefits; vendor compliance; conflicts of interest; financial planning; purchasing; contracts; food service; and foundations.

## **5. RATES/FEE STRUCTURE**

HYA has proposed the following fees for the Fiscal Health Analysis and additional optional services for consideration.

Fiscal Health Analysis: \$50,000

Timeframe: Estimated completion date August 1, 2024.

The fee will be billed monthly.

Travel to the District for on-site meetings/engagements will be reimbursed by the District.