

May 2024 Annual Town Meeting Article 12 Frequently Asked Questions: Town & School IT Consolidation

- **Why are the Town and Schools Consolidating Information Technology (IT) Services?**

Following the 2022 departure of several key individuals within the Town of Needham Informational Technology Department, the School Department stepped in to assist with and oversee operations on an interim basis and to provide critical services in the area of network, applications and user support. Based on the early success of this collaboration, and in collaboration with the Select Board, School Committee, and Finance Committee chairs, the Town Manager and Superintendent retained the services of a consulting firm to review and assess the optimal structure for school and town technology services, including whether some or all services should be combined, how duties should be distributed and what the potential cost of implementation might be.

- **What Did the Consulting Firm Recommend?**

In November 2023, Plante Moran, LLC, an audit firm with experience in municipal sector information technology consulting, concluded its Informational Technology (IT) Organizational Assessment. That report, which is available on the School Department website at https://www.needham.k12.ma.us/departments/information_technology_services, recommended that the Town and School technology departments be unified as a single structure under the direction of the Needham Public Schools.

In addition, Plante Moran recommended that the Town of Needham:

- Engage in strategic technology planning;
- Improve its cybersecurity infrastructure;
- Update its inventory of technology assets and software;
- Replace/ upgrade aged and legacy technologies;
- Implement technology training programs for staff;
- Evaluate the effectiveness of administrative software solutions for potential improvements;
- Standardize technologies across the organization, where possible; and
- Develop updated policies and procedures.

- **How will the Town of Needham Benefit from IT Service Consolidation?**

The planned move will facilitate Town-wide planning of strategic priorities and initiatives; will create opportunities for shared infrastructure and operational efficiencies; will provide consistent implementation of IT policy, procedure and training; and will result in greater cohesion and collaboration between departments of the Town.

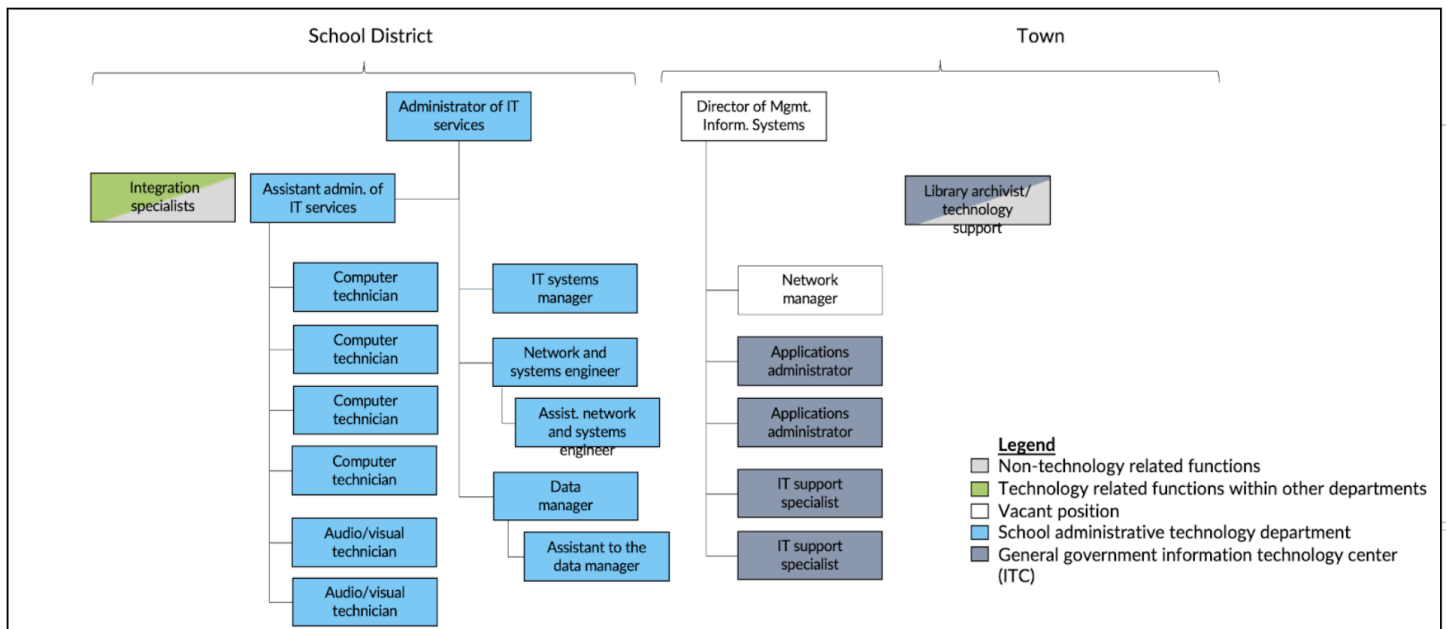
- **What is the Proposed Plan and Timeline for Implementation?**

The proposed consolidation would occur in a phased approach, broadly consisting of the following:

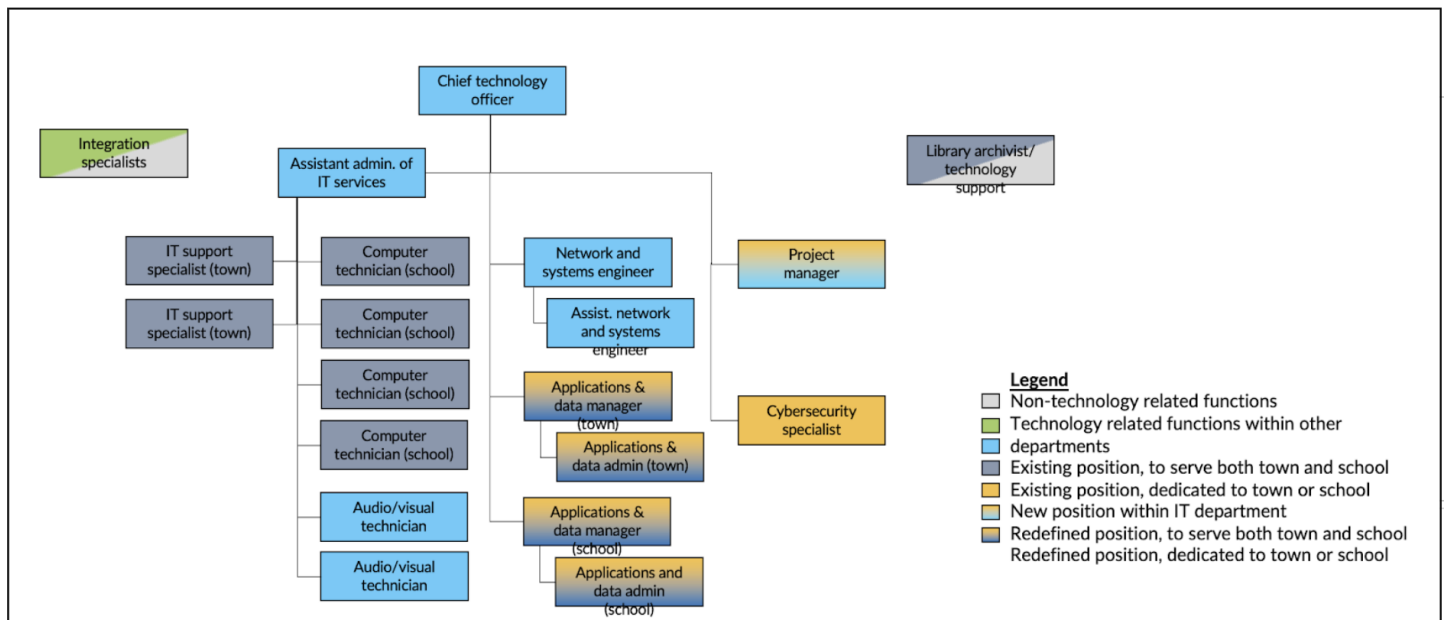
- FY24: Continue the existing, interim structure; Leverage external vendors to provide services, where needed; Update inventories; Engage in risk assessment; Solicit Employee Feedback; and Prepare for consolidation. Preparations include the reorganization of budgets, the development of a Memorandum of Understanding (MOU) to guide consolidation, and the formation of an IT Steering Committee comprised of representative user groups.
- FY25: Implement a 'transitional,' consolidated structure; Spin-off non-technology functions; Develop IT strategic plans; Update policies/procedures; Engage in staff training.
- FY26: Implement a permanent organizational structure; Replace legacy technology, as needed; Focus on systems integration, workflow improvements and software assessments.

- **What are the Current and Proposed Organizational Structures?**

The current structure of school and general government IT services is:



The consolidated structure proposed by Plante Moran is:



• What is the Proposed Implementation Budget?

The proposed implementation budget is \$4,561,761, which includes the school technology budget of \$2,063,836, and the municipal technology budget of \$1,904,283. It also includes \$593,643 in additional expenses, requested via separate warrant article (Article 12.)

The additional expenses break down as follows:

In the area of staffing, an increase in salary funds (of \$129,859) is required to transition employees and backfill functions that will be removed from the IT scope (student registration and data analysis/reporting.) The Superintendent and Town Manager intend to assess staffing levels over the next two years to determine if the number of personnel are adequate, particularly in the areas of applications and network support.

In the area of supplies and services, \$463,784 are needed for the following new and ongoing expenses:

- Network oversight and cybersecurity \$204,034
- Zoom phone system configuration, deployment and support, \$91,700
- Help desk support, including 24/7 services to public safety functions, \$26,800
- Outsourced printer maintenance, \$65,000
- Implementation policy consulting services, \$50,000
- Accelerated Town device replacement, \$26,250

Future year investments will focus on the replacement of legacy technologies and administrative systems upgrades.

• Will the Proposed Consolidation Result in Budget Savings?

The consolidated structure is expected to result in operational efficiencies down the road, as the need for managed services is reduced, purchasing becomes more efficient through economies of scale, and technologies become standardized across the organization. In the short term, however, Plante Moran identified an immediate need to invest in key areas of the Town's technology infrastructure. These areas include: network security; 24/7 support for safety-sensitive functions; strategic plan and policy/procedure development; and replacement cycle funding for legacy technologies and outdated administrative systems.

- **What will Town Meeting be Asked to Approve?**

In May, Town Meeting will be asked to approve the consolidation plan, as well as the additional funds required to implement the Plante Moran recommendations, though the following financial warrant article:

ARTICLE 12: APPROPRIATE FOR INFORMATION TECHNOLOGY CONSOLIDATION

To see if the Town will vote to accept the provisions of Massachusetts General Laws Chapter 71 Section 37M to consolidate information technology services of the School Committee and The Town under the direction of the School Committee, and to raise and/or transfer and appropriate the sum of \$593,643 to support information technology consolidation, to be spent under the direction of the School Committee, and to meet this appropriation that said sum be transferred from Free Cash; or take any other action relative thereto

INSERTED BY: Select Board, School Committee

- **How Would the Consolidated Budget be Appropriated to the School Department?**

The recommendation is for the municipal IT budget, which is currently included within the Town's Finance Department budget, to be transferred to the School Department. For ease of review by Town Meeting, and to provide public transparency, the Town Warrant includes a second appropriation line to the Needham Public Schools, as follows:

Article 13 – Appropriate the FY25 Operating Budget:

- 21 Needham Public Schools - Needham Public School Budget (\$2,063,836 of \$97,517,926)
- 22 Needham Public Schools - Municipal Information Technology (\$1,904,283)

The remaining consolidation budget funds would be appropriated via the separate warrant article referenced above.

Article 12 – Appropriate for Information Technology Consolidation (\$593,643)

- **Why is it Important to Consolidate Budgets and Operations within a Single Structure?**

The efficient operation of a consolidated IT structure requires common operational and financial leadership. In the absence of consolidation, the Town Charter would require that town technology operations remain under the control and direction of the Town Manager and school technology operations remain under the School Committee. In addition, the expenditure of funds would continue to be subject to the differing fiscal priorities and budgetary planning processes of the two entities. Further, it is crucial that one department oversee operations, including resources and budget,

to ensure cohesion and the efficient and practical use of IT staff and resources. Without a consolidation of budget resources and operations it will be impractical to implement this plan.

- **Is Consolidation Permitted by Law?**

Yes. Massachusetts General Law c. 71 s. 37M, permits a city or town to consolidate certain administrative functions, such as technology administration, upon acceptance of this statute. Such consolidation would require a majority vote of both the School Committee and the Annual Town Meeting. Under that statute, the decision to consolidate functions also can be revoked by a majority vote of either the School Committee or Town Meeting, or both.

Additionally, Section 17 of the Town's Charter grants to the School Committee "... all the powers, duties, responsibilities and functions vested in school committees by the General Laws and as delegated to it by the Town which are not inconsistent with the General Laws. The School Committee shall execute all laws pertaining to educational responsibilities assigned to the Town and such further responsibilities as may be delegated to them by vote of the Town."

- **Have the School Committee and Select Board voted to support the Consolidation?**

Yes, the School Committee voted to support the consolidation when it approved the warrant article that will go to Town Meeting in May, and the Select Board voted to support the merger as well. The Superintendent of Schools and Town Manager also strongly support the consolidation of Town and School IT services.

- **Do School IT Staff Have the Requisite Experience, Qualifications and Clearance to Oversee Town IT Services, Including Sensitive Public Safety Functions?**

Yes, school IT staff are experienced, qualified and certified to work with the type of technology infrastructure that underlies general government operations, including networks, equipment and applications. In fact, School staff have been working with and overseeing public safety and public infrastructure (e.g., water) for over a year now.

School IT staff maintain the school department's multi-building network and have provided both training and backup services to Town IT staff in this area. School staff also have the skills and experience necessary to manage and support all types of information technology devices (such as computers, servers, telecommunications equipment, cameras, and specialty equipment), and to lay low voltage wiring. Additionally, school staff are experienced with administering enterprise-level information software systems, including both financial and information management systems. Finally, school staff have experience working with Apple, PC and cloud-based environments, as well as their associated operating platforms.

Additionally, school IT staff have the experience and qualifications needed to administer systems that contain sensitive and protected information. All IT staff working in the Public Safety Building must be Criminal Justice Information Services (CJIS)-certified for the Town to remain compliant in this area. CJIS certification is a requirement for organizations that access or use criminal justice information (CJI). The certification is administered by the Federal Bureau of Investigations and is designed to ensure that organizations have the necessary security measures in place to protect CJI. Currently, both the School Director of Administrative Information Technology Services and the individual providing 24/7 contract support services to Public Safety are CJIS-certified. Additionally, school staff routinely work with systems that contain Health Insurance Portability and Accountability

Act (HIPPA)-protected health information, confidential student information protected by the Family Educational Rights and Privacy Act (FERPA), and other restricted data.

- **Why are IT Services Proposed to be Consolidated Under the School Committee Instead of the Town Manager?**

The School Department has a large, experienced and well-run department that is capable of scaling up to administer general government technology operations, as well. Additionally, the School Department already has been functioning in this capacity for over a year, since the departure of the Town's senior technology staff. Finally, the School Department is both ready and willing to accept the responsibility of supporting the Town's technology infrastructure into the future. Just as the Town assumed responsibility and oversight for school maintenance many years ago, the Schools are prepared and qualified to do the same with IT services.

- **What Guarantees will the Town Have for Subsequent Service under School Leadership?**

The Superintendent and Town Manager will execute a Memorandum of Understanding which will set out their expectations and commitments, including as they relate to resource allocation, budget transparency, and problem solving. Furthermore, the School Committee will continue to work closely with the Finance Committee to ensure the high level of transparency, efficiency and accountability that has been the case for many years.

- **Is this Town-School Collaboration Supported by Historical Precedent and Prior Working Relations?**

Yes. The Town Manager and School Superintendent, in partnership with the Select Board and School Committee, have a long history of success operating in a cooperation to oversee school building projects, to maintain school facilities, and to support the work of school resource officers and crossing guards, among other initiatives. Additionally, the parties will act proactively to ensure that the special technology needs of each will continue to be met within a consolidated structure through the enactment of a Memorandum of Understanding, through the creation of an information technology advisory committee comprised of representative user groups, and through continued representation on the Town's established Technology Advisory Board (TAB).

- **Are there other communities that have consolidated IT services in this way?**

Yes. The towns of Brookline, Franklin, Duxbury, Medfield and Natick have consolidated services in this way and under the jurisdiction of the School Committee.