

SPECIAL MEETING OF RSU NO. 5 BOARD OF DIRECTORS
WEDNESDAY – JULY 1, 2026
FREEPORT HIGH SCHOOL - LIBRARY
6:30 P.M. SPECIAL SESSION
AGENDA

1. Call to Order:

The meeting was called to order at _____ p.m. by Chair Michelle Ritcheson

2. Attendance:

____ Colin Cheney
____ Karen Breer
____ Anna Child
____ Melissa Jordan
____ Kara Kaikini
____ Michelle Ritcheson

____ Christopher Savaiano
____ Kelly Sink
____ Anne Ware
____ Valerie Williams
____ Stephanie Worth
____ Maria Abbatemarco, Student Representative
____ Moon Tussing, Student Representative

3. Pledge of Allegiance:

4. Consideration of Minutes:

A. Consideration and approval of the Minutes of June 3, 2026 and June 10, 2026 as presented barring any errors or omissions.

Motion: _____ 2nd: _____ Vote: _____

5. Adjustments to the Agenda:

6. Good News & Recognition:

None

7. Public Comments: (10 Minutes)

8. Reports from Superintendent:

None

9. Administrator Reports:

None

10. Board Comments and Committee Reports:

None

11. Policy Review:

None

12. Unfinished Business: (30 Minutes)

- A. Update on Systems and Sustainability Study RFP - Tom Gray
- B. Consideration and approval to expend up to an additional \$50,000 for the Systems and Sustainability Study, for a total of \$150,000. Additional funds to come from the Capital Reserve.

Motion: _____ 2nd: _____ Vote: _____

13. New Business:
None

14. Personnel: (5 Minutes)

- A. Consideration and approval to allow the Superintendent to create positions, until the first Board meeting in September, for the Special Education Early Childhood program with funding to come from the Early Childhood subsidy from the State.

Motion: _____ 2nd: _____ Vote: _____

15. Public Comments: (10 Minutes)

16. Executive Session:

- A. Consideration and approval to enter into Executive Session for discussion of a confidential record pursuant to 1 M.R.S.A § 405(6)(F).

Motion: _____ 2nd: _____ Vote: _____

Time In _____ Time Out _____

17. Action as a Result of Executive Session:

18. Adjournment:

Motion: _____ 2nd: _____ Vote: _____ Time: _____

**RSU No. 5 Board of Directors Meeting
Wednesday, June 3, 2026 – 6:30 p.m.
Freeport High School - Library
Meeting Minutes**

(NOTE: These Minutes are not official until approved by the Board of Directors. Such action, either to approve or amend and approve, is anticipated at the August 26, 2026 meeting).

- 1. CALLED TO ORDER:**
Chair Michelle Ritcheson called the meeting to order at 6:34 p.m.
- 2. MEMBERS PRESENT:** Karen Breer, Colin Cheney, Anna Child (left at 11:00 p.m.), Malik Farlow, Lois Kilby-Chesley, Michelle Ritcheson, Christopher Savaiano, Kelly Sink, Valerie Williams, Stephanie Worth. Moon Tussing, Student Representative (left at 8:40 p.m.)
MEMBERS ABSENT: Kara Kaikini
- 3. PLEDGE OF ALLEGIANCE:**
- 4. CONSIDERATION OF MINUTES:**
A. **VOTED:** To approve the Minutes of April 29, 2026, May 6, 2026 and May 13, 2026.
(Breer – Worth) (10 – 0) The Student Representative voted with the majority.
- 5. ADJUSTMENTS TO THE AGENDA:**
Addition of an Executive Session to discuss a personnel matter.
- 6. GOOD NEWS AND RECOGNITION:**
A. Recognition of Retirees
B. Report from Board's Student Representative - Moon Tussing
- 7. PUBLIC COMMENT:**
Kate McElligott, Freeport; Lindsay Hahn, Pownal
- 8. REPORTS FROM SUPERINTENDENT:**
A. Superintendent's Report
B. Resignations/Retirement: Amber Harrison - MSS PreK Teacher
Jen Gulko - FHS Principal
Kelly Howard - PES PreK Teacher
Fred Toppan - District Computer Technician
John Pyrtek - FHS Ed Tech (Retirement)
C. Schedule of 2026-2027 Board Meetings
D. Cell Phone Implementation
- 9. ADMINISTRATOR REPORTS:**
A. Finance - Tom Gray
- 10. BOARD COMMENTS AND COMMITTEE REPORTS:**
A. Board Information Exchange and Agenda Requests
B. Facilities and Operations Committee
C. Finance Committee

- D. Stipend Committee
- E. Curriculum and Program Development
- F. Policy Committee

11. POLICY REVIEW:

- A. **VOTED:** To approve 2nd Read of the following policies:
 - 1. IHBAC - Child Find
 - 2. IMBB - Exemption from Required Instruction
 - 3. IJJ - Instructional and Library-Media Materials Selection (with revisions)
 - 4. IJJ-E - Citizen's Challenge of Educational Media Form
 - 5. JRA - Student Education Records and Information
 - 6. JRA-E - Annual Notice of Student Education Records and Information Rights
- (Sink – Breer) (10 – 0)

12. UNFINISHED BUSINESS:

- A. **VOTED:** To approve expending up to an additional \$5,000 from Capital Projects Reserve Fund for the design of four tennis courts. Plans to include both post tension and asphalt options. (Farlow – Sink) (10 - 0)
- B. Weighted Values Synthesis Summary

13. NEW BUSINESS:

- A. **1. VOTED:** To approve the Middle School Swimming Stipend Position, pending budget approval (Cheney – Savaiano) (9 - 1 Kilby-Chesley)
- 2. VOTED:** To approve the Middle School Unified Basketball Stipend Position, pending budget approval (Breer – Worth) (10 - 0)

VOTED: To continue the meeting after 10:00 p.m. (Sink - Breer) (10 - 0)

14. PERSONNEL:

- A. **VOTED:** To employ Rachel Lannino as a School Counselor at Mast Landing School for the 2026-2027 school year. (Worth – Breer) (10 - 0)

15. PUBLIC COMMENT:

Kate McElligott, Freeport; Mark Dohle, Pownal

16. EXECUTIVE SESSION:

- A. **VOTED:** To enter into Executive Session as outlined in 1 M.R.S.A § 405(6)(A) for the purpose of discussing a personnel matter. (Williams – Farlow) (10 – 0)

Time In: 10:11 p.m.

Time Out: 11:10 p.m.

17. ACTION AS A RESULT OF EXECUTIVE SESSION:

None

18. EXECUTIVE SESSION:

- A. **VOTED:** To enter into Executive Session as outlined in 1 M.R.S.A § 405(6)(D) for the purpose of discussing the Superintendent's evaluation. (Savaiano – Breer) (9 – 0)

Time In: 11:10 p.m.

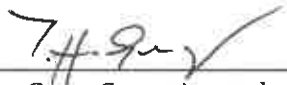
Time Out: 11:50 p.m.

19. ACTION AS A RESULT OF EXECUTIVE SESSION:

None

20 . ADJOURNMENT:

VOTED: To adjourn at 11:50 p.m. (Savaiano – Sink) (9 – 0)



Tom Gray, Superintendent of Schools

**RSU No. 5 Board of Directors Meeting
Wednesday, June 10, 2026 – 6:30 p.m.
Freeport High School - Library
Meeting Minutes**

(NOTE: These Minutes are not official until approved by the Board of Directors. Such action, either to approve or amend and approve, is anticipated at the August 26, 2026 meeting).

1. CALLED TO ORDER:

Chair Michelle Ritcheson called the meeting to order at 6:32 p.m.

2. MEMBERS PRESENT: Karen Breer, Colin Cheney, Anna Child, Malik Farlow, Kara Kaikini, Lois Kilby-Chesley, Michelle Ritcheson, Christopher Savaiano, Kelly Sink, Valerie Williams, Stephanie Worth. Maria Abbatemarco, Student Representative

MEMBERS ABSENT: None

3. PLEDGE OF ALLEGIANCE:

4. CONSIDERATION OF MINUTES:

None

5. ADJUSTMENTS TO THE AGENDA:

Move Items 15.A and 15.B. after Item 8.

6. GOOD NEWS AND RECOGNITION:

A. Report from Board's Student Representative - Maria Abbatemarco

7. PUBLIC COMMENT:

Kate Martens, Pownal

8. REPORTS FROM SUPERINTENDENT:

A. Superintendent's Report

B. Resignation: Amy Colton - FMS .5 RTI Math Teacher

15. PERSONNEL:

A. **VOTED:** To employ Nicholas Weiss as the Director of Transportation for the 2026-2027 school year. (Child – Farlow) (11 - 0) The Student voted with the majority.

B. **VOTED:** To employ Thomas O'Hara as a Speech and Language Pathologist for the 2026-2027 school year. (Sink – Worth) (11 - 0) The Student voted with the majority.

9. ADMINISTRATOR REPORTS:

A. Strategic Plan Presentation - Tom Gray and Members of the Strategic Planning Committee

10. BOARD COMMENTS AND COMMITTEE REPORTS:

None

11. POLICY REVIEW:

None

12. UNFINISHED BUSINESS:

- A. **VOTED:** To approve the revised RSU5 Strategic Plan. (Cheney – Worth) (11 - 0) The Student voted with the majority.
- B. **VOTED:** That the Computation and Declaration of Votes dated June 10, 2026 and attached hereto be approved.
Further moved: That the Computation and Declaration of Votes be entered upon the records of Regional School Unit No. 5.
Further moved: That a certified copy of the Computation and Declaration of Votes be sent to each of the Municipal Clerks of the member municipalities within Regional School Unit No. 5. (Sink – Savaiano) (11 - 0) The Student voted with the majority.
- C. **VOTED:** That the Warrant for Assessment of Tax and the Assessment Schedule and Notice of Installments for each member municipality prepared by the Treasurer for fiscal year July 1, 2026 to June 30, 2027 be approved and be issued in form presented to this meeting; and that the Treasurer be authorized and directed to deliver to each member municipality its Warrant for Assessment of Tax and its Assessment Schedule and Notice of Installments. (Kaikini – Breer) (11 - 0) The Student voted with the majority.

13. NEW BUSINESS:

- A. **VOTED:** To approve the Comprehensive Education Plan (Kaikini – Farlow) (11 - 0) The Student voted with the majority.
- B. **VOTED:** To authorize the Superintendent to hire staff between June 11, 2026 and the first Board meeting in September 2026. (Savaiano – Sink) (11 - 0) The Student voted with the majority.
- C. **VOTED:** That pursuant to section 1485(4) of Title 20-A, the Finance Committee be authorized to transfer not more than 5% of the total appropriation for any cost center in the FY27 operating budget to another cost center or among other cost centers, provided that the total FY27 fiscal year operating budget shall not be increased by such transfers. (Sink – Worth) (11 - 0) The Student voted with the majority.
- D. **VOTED:** That the Vote entitled, “Vote to Accept Gift of Funds for Track Resurfacing,” be approved in form presented to this meeting, and that an attested copy of the Vote be filed with the meeting minutes. (Worth – Breer) (11 - 0) The Student voted with the majority.
- E. **VOTED:** To accept a gift from Estate of David A. Perkins, Sr. to establish the Megan L. Beane JMG Scholarship fund.
To accept the offer from the personal representative of the Estate of David A. Perkins to donate funds [of approximately \$90,000] from the Estate to Regional School Unit No. 5 to establish the Megan L. Beane JMG Scholarship Fund and to authorize the Superintendent of Regional School Unit No. 5 to enter into an agreement with the Estate and its personal representative governing the donation of funds and administration of the scholarship fund. (Child – Williams) (11 - 0) The Student voted with the majority.

14. ORGANIZATIONAL BUSINESS:

- A. **VOTED:** To appoint Michelle Ritcheson as Chair for the RSU No. 5 Board of Directors (to take effect July 1, 2026). (Williams – Savaiano) (11 - 0) The Student voted with the majority.
- B. **VOTED:** To appoint Kelly Sink as Vice-Chair for the RSU No. 5 Board of Directors (to take effect July 1, 2026). (Williams – Child) (11 - 0) The Student voted with the majority.
- C. **VOTED:** To approve the following appointments for the 2026-2027 school year:
 - 1. Drummond Woodsum, School Attorney
 - 2. Dr. Stephanie Phelps, School Physician(Farlow – Breer) (11 - 0) The Student voted with the majority.

16. PUBLIC COMMENT:

Meghan Metzger, Pownal

17. EXECUTIVE SESSION:

A. **VOTED:** To enter into Executive Session as outlined in 1 M.R.S.A § 405(6)(A) for the purpose of discussing the Superintendent's evaluation (Breer – Worth) (11 – 0) The Student voted with the majority.

Time In: 8:20 p.m.

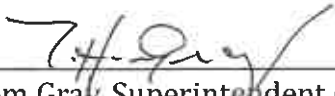
Time Out: 9:53 p.m.

18. ACTION AS A RESULT OF EXECUTIVE SESSION:

A. **VOTED:** To execute a contract for the Superintendent of Schools as discussed in Executive Session. (Sink – Williams) (11 – 0)

20 . ADJOURNMENT:

VOTED: To adjourn at 9:54 p.m. (Farlow – Kilby-Chesley) (11 – 0)



Tom Gray, Superintendent of Schools



RSU5 Systems & Sustainability Study

Regional School Unit No. 5 | Freeport, ME

RFP Issue Date: May 8 2026

Revised Proposal Sent: June 11, 2026

Revised Proposal Sent: June 17, 2026

Revised Proposal Sent: June 23, 2026

Submitted by:



Zeal Education Group

Danbury, Connecticut

info@zeal-ed.com | 629.249.6952 | www.zeal-ed.com

June 12, 2026

Dear Superintendent Gray and Team,

Thank you for taking the time to provide feedback on our original proposal. Our conversation provided greater clarity around the purpose of this study and deepened our excitement about the opportunity to be part of something truly impactful in your educational community.

As shared in “A Community Conversation About Our Schools’ Future” in March 2026:

When districts reach moments like this, there are generally two choices. One is to manage year to year, adjusting around the edges and hoping pressures ease. The other is to step back and ask bigger questions about long-term sustainability, not because something is broken, but because thoughtful planning now can prevent much harder decisions later. This is the space we are in, and this challenges us to think creatively and have open conversations about topics that are close to our hearts: the way our schools work.

We appreciate that this study represents more than an operational review. It is an opportunity to help the district connect its emerging Strategic Plan with a broader vision for the future of its schools, facilities, programs, staffing structures, transportation systems, and long-term resource allocation.

The revised scope of this proposal recognizes that facilities planning cannot be separated from educational visioning. Buildings are not simply physical assets. They shape how students learn, how staff collaborate, how programs are delivered, how communities gather, and how the district expresses its priorities. For that reason, Zeal’s approach will examine facilities, staffing, transportation, operations, programming, and community aspirations as interconnected parts of one system.

Through a comprehensive, data-informed, and community-centered process, Zeal will support RSU 5 in developing a clear understanding of current conditions and future possibilities. Our work will include operational analysis, demographic and enrollment review, facility utilization and condition considerations, stakeholder engagement, educational visioning, and the development of practical recommendations that align people, programs, buildings, and resources with the district’s long-term goals.

The result will be more than a report. It will be a strategic roadmap that helps RSU 5 make informed decisions, strengthen organizational effectiveness, support student success, and plan responsibly for the next generation of learners.

Zeal Education Group is uniquely positioned to support this work. Our team brings together experienced superintendents, organizational effectiveness experts, community engagement specialists, operational leaders, and educational facility planning professionals. We understand that the strongest recommendations are not only technically sound, but also educationally meaningful, financially responsible, operationally feasible, and grounded in the values of the communities the district serves.

Sincerely,



Jeff Melendez, Ed.D.
Founder & CEO
Zeal Education Group

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ZEAL EDUCATION GROUP: OVERVIEW & QUALIFICATIONS

Zeal Education Group is made up of 100+ seasoned superintendents, principals, school board members, chief financial officers, facilities leaders, and executive administrators who have spent their careers leading public school systems through periods of growth, change, and strategic transformation. We are not career consultants. We are practitioners who have managed budgets, aligned staffing models, evaluated facilities, navigated complex community conversations, and made difficult decisions regarding the long-term sustainability of school districts.

This practical experience allows us to approach RSU 5's Systems and Sustainability Study from the perspective of those who have sat in the seats of district leaders and board members. We understand that sustainability is not simply a financial exercise. It requires thoughtful alignment of people, programs, facilities, transportation systems, and community priorities to ensure that resources support student success today while preserving opportunities for future generations.

Zeal specializes in helping schools and districts navigate moments of transition, instability, and reinvention. Our team understands the tension between honoring legacy and confronting sustainability. We do not arrive with predetermined answers; we help communities surface their own truths and translate them into clear, actionable plans.

"Outside View - Inside Perspective"

Although Zeal is a national firm, we are headquartered in the northeast and have experience working with Maine school districts on efficiency audits and with School Committees for superintendent searches. Our northeast footprint brings a contextual understanding to this project.

Firm Information

Company Name	Zeal Education Group
Business Address	800 N. King Street, Suite 304-2029, Wilmington, DE 19801
Primary Contact	Jeff Melendez, Ed.D. Founder & CEO
Phone	203-885-6011
Email	jeff@zeal-ed.com
Website	www.zeal-ed.com
Federal EIN	88-2168043
Entity Type	Limited Liability Company (LLC)
Parent Company / Subsidiary	Zeal Education Group is not a subsidiary of any other corporation.

Years in Business	Actively serving K-12 districts nationally since 2023.
Total Personnel	Zeal maintains a core administrative team and a national network of over 100 active consultant-associates spanning every domain of K-12 education.
Staff Dedicated to This Project	Jeff Melendez, Ed.D., Andrew Dolloff, Ph.D., Prakash Nair, AIA, Joseph S. Micheller, Ed.D., and Richard Katz, Ed.D.
Primary Line of Business	K-12 education consulting including special education audits, superintendent searches, strategic planning, instructional coaching, security audits, and professional development services for public school districts nationwide.

Use of Subcontractors

Zeal anticipates utilizing specialized partners, where appropriate, to support demographic forecasting. Any subcontractors engaged will possess demonstrated expertise in public-sector planning, educational facilities, and applicable Maine regulations and requirements.

All subcontractors will operate under Zeal's direction and quality-control process, ensuring consistency of methodology, communication, stakeholder engagement, and final recommendations throughout the study. This collaborative model allows Zeal to bring together the specialized expertise required for a comprehensive Systems and Sustainability Study while maintaining a single point of accountability for RSU 5.

What distinguishes Zeal is our ability to integrate technical analysis with meaningful stakeholder engagement, recognizing that decisions regarding staffing, facilities, transportation, and resource allocation are not simply operational considerations. They are community decisions that affect students, families, employees, and taxpayers for years to come.

At Zeal, we believe the strongest recommendations are those that are both analytically sound and community informed. We look forward to partnering with RSU 5 to develop a comprehensive systems and sustainability study that honors the district's proud traditions while positioning it for long-term operational excellence and educational success.

INTEGRATED STAKEHOLDER ENGAGEMENT METHODOLOGY

We believe that systems and sustainability studies are most successful when they balance technical analysis with the lived experience, values, and aspirations of the communities they serve. Decisions regarding facilities, staffing, transportation, programming, and resource allocation affect students, families, employees, taxpayers, and community members for years to come. For that reason, stakeholder engagement will not be treated as a separate activity. It will be integrated throughout the study as one of the primary methods by which Zeal gathers information, tests assumptions, identifies priorities, and develops recommendations.

To ensure broad participation across Durham, Freeport, and Pownal, Zeal will use a combination of leadership interviews, focus groups, community forums, student voice opportunities, Design Spark Sessions, and ThoughtExchange. This process will allow the study team to gather both qualitative and quantitative feedback from stakeholders while identifying areas of consensus, concern, aspiration, and divergence across the district community.

Stakeholder engagement opportunities may include:

- Board of Directors interviews
- Superintendent and Cabinet interviews
- Building and district administrator focus groups
- Faculty and staff engagement sessions
- Student voice opportunities
- Community forums
- Town-specific stakeholder outreach
- Design Spark Sessions in Freeport, Durham, and Pownal
- Districtwide ThoughtExchange engagement

ThoughtExchange provides several advantages for a project of this nature, including accessible participation from any device, multilingual translation capabilities, anonymous feedback opportunities, quantitative and qualitative data collection, participant rating and prioritization of ideas, and transparent identification of areas of consensus and divergence.

Findings from stakeholder engagement will be integrated into each major area of the study, including organizational analysis, staffing review, facility utilization, educational environment assessment, grade and program alignment, transportation logistics, demographic planning, Early Childhood considerations, and Strategic Plan alignment. This will ensure that Zeal's recommendations are not only data-informed and operationally sound, but also reflective of the values, priorities, and aspirations of the RSU 5 community.

Communication Planning and Process Coordination

Zeal will work with RSU 5 to support clear, consistent, and transparent communication throughout the study. Because systems and sustainability work often involves sensitive topics related to facilities, staffing, programming, transportation, and long-term resource allocation, the communication process must be intentional from the outset. The goal is to ensure that faculty, staff, families, students, community members, and municipal stakeholders understand the purpose of the study, the process being used, the opportunities for participation, and the distinction between exploring options and making decisions.

This communication support will include both internal and external communication planning. Internally, Zeal will help the district communicate with faculty, staff, administrators, and employee groups so they understand how the study will be conducted and how their input will be gathered. Externally, Zeal will help the district communicate with families, taxpayers, town officials, and community members across Durham, Freeport, and Pownal to build awareness, encourage participation, and reduce confusion or misinformation.

As part of this work, Zeal will support RSU 5 in developing a meeting and engagement calendar that identifies key points of contact with faculty, staff, students, families, community members, and district leadership. This calendar may include leadership interviews, staff focus groups, student voice opportunities, community forums, Design Spark Sessions, ThoughtExchange windows, Board updates, and other engagement opportunities identified in collaboration with the district.

Zeal will also assist with drafting a community letter or public-facing communication from the district that explains the purpose of the engagement, the rationale for the study, the major areas of review, the timeline, and how stakeholders can participate. This communication will be designed to reinforce transparency, clarify that the process is exploratory and data-informed, and invite the community into a respectful conversation about the future of RSU 5's schools.

To support coordination and efficiency, RSU 5 will assign a district point of contact to participate fully in the process. This individual will help coordinate schedules, provide requested documents and data, support communication with internal stakeholders, assist with logistics for meetings and engagement sessions, and serve as the primary liaison between the district and Zeal's project team. A clear point of contact will help ensure timely communication, consistent messaging, efficient access to information, and smooth implementation of the study process.

ORGANIZATIONAL & STAFFING ANALYSIS

I. Program and Department Efficiencies and Effectiveness

Zeal Education Group will conduct a comprehensive organizational effectiveness review designed to determine whether current staffing structures, reporting relationships, departmental configurations, and resource allocations are aligned with the district's educational priorities, operational demands, and long-term sustainability goals.

Our analysis will begin with a review of organizational charts, position descriptions, staffing assignments, departmental budgets, collective bargaining agreements, workload expectations, and historical staffing trends. We will examine how responsibilities are distributed across departments and identify opportunities to improve efficiency, eliminate redundancies, strengthen collaboration, and better align resources with district priorities.

In addition to quantitative analysis, Zeal will conduct interviews and focus groups with administrators, department leaders, supervisors, and representative staff members to better understand operational realities, workflow challenges, and opportunities for improvement that may not be evident through data review alone.

The organizational review will focus on three essential questions:

- Are resources allocated in a manner that supports district priorities and student outcomes?
- Are staffing levels and structures aligned with actual workload demands?
- Are there opportunities to improve effectiveness, efficiency, communication, or service delivery?

To answer these questions, Zeal will utilize comparative benchmarking against peer districts in Maine and nationally, organizational effectiveness frameworks, workload analyses, and operational best practices.

II. Staff Alignment with Work

Beyond reviewing staffing counts, Zeal will examine whether personnel assignments are appropriately aligned with the responsibilities employees are expected to perform.

This analysis will include:

- Review of position descriptions and assigned duties
- Evaluation of workload distribution
- Span of control analysis
- Review of supervisory structures
- Assessment of role clarity and accountability

-
- Evaluation of staffing deployment across schools and departments
 - Identification of duplicated responsibilities or service gaps

The goal is to determine whether current staffing structures maximize employee effectiveness while supporting high-quality service delivery across the district.

Where appropriate, Zeal will identify opportunities to realign responsibilities, redesign organizational structures, or redistribute resources to improve efficiency and effectiveness without compromising educational quality.

III. Full-Time Equivalent (FTE) Analysis by Budget Article

Zeal will conduct a detailed review of staffing allocations and Full-Time Equivalent (FTE) ratios across all budget articles identified in the RFP.

For each article, the analysis will include:

- Staffing levels
- Staffing trends over time
- FTE-to-student ratios
- Workload indicators
- Cost analysis
- Comparative benchmarking
- Alignment to district priorities and strategic goals

Organizational and Staffing Analysis Deliverables

The Organizational and Staffing Analysis section of the final report will include:

- Current-state organizational assessment
- Department-by-department findings
- Analysis of program and department efficiencies and effectiveness
- Staffing structure and reporting relationship analysis
- Staff alignment with work responsibilities
- Workload distribution and span-of-control observations
- FTE ratio analysis by budget article
- FTE-to-student ratio findings
- Comparative benchmark data, where available and appropriate
- Identification of staffing strengths, redundancies, service gaps, and opportunities for realignment
- Organizational effectiveness observations
- Alternative organizational scenarios, where appropriate
- Cost implications of recommendations, where applicable
- Short-, medium-, and long-term recommendations aligned to the district's Strategic Plan and Operational Excellence goals

The final recommendations will prioritize educational effectiveness, fiscal responsibility, operational sustainability, and alignment with the future needs of RSU 5.

INFRASTRUCTURE & LOGISTICS

I. Facilities Assessment and Educational Environment Analysis

Zeal, in partnership with Education Design International, will conduct an educational facilities planning assessment designed to examine how RSU 5's buildings currently support teaching, learning, student well-being, program delivery, operational effectiveness, and future educational priorities.

This work is not intended to serve as a comprehensive architectural, engineering, environmental, structural, mechanical, plumbing, electrical, accessibility, or site condition assessment. Rather, it will provide RSU 5 with a rigorous educational facilities planning review focused on how existing schools function as learning environments, how they are utilized, how they support current and future programming, and where targeted investments may strengthen the student and staff experience.

This portion of the study will be led by Zeal as part of the broader Systems and Sustainability Study. EDI's role will be to provide specialized expertise in educational facilities planning, school design, learning environment assessment, and educational visioning.

Using the proprietary tool developed by Education Design International (EDI), Zeal will assess whether district facilities effectively support current instructional practices and future educational goals.

This review will examine:

- Classroom configurations
- Specialized instructional spaces
- Collaborative learning environments
- Career and technical education spaces
- Early childhood programming spaces
- Student support areas
- Administrative spaces
- Community use opportunities

The objective is to determine whether facilities support modern teaching and learning practices and provide flexibility for future programmatic needs.

The facilities and educational environment analysis will include the following schools:

- Freeport High School
- Freeport Middle School
- Durham Community School
- Mast Landing School

-
- Morse Street School
 - Pownal Elementary School

Building Assessments and Site Walks

Zeal and EDI will visit each school to gain an understanding of existing facilities, educational programs, operational challenges, and opportunities for future improvement.

For each school, the review will include:

- Assessment of circulation, adjacencies, campus organization, and space utilization
- Review of opportunities for flexibility, collaboration, student agency, and future adaptability
- Identification of facility strengths, challenges, and constraints
- Photographic documentation of key spaces and campus features
- Annotated observations describing major findings related to learning environments and campus use
- Documentation of opportunities for future improvements and potential Pathfinder Project concepts
- Programming discussions with school and district representatives

The programming discussions will focus on existing challenges, unmet needs, program aspirations, facility constraints, and opportunities to enhance teaching and learning through more effective educational environments.

EDI Educational Environment Assessment Tools

As part of the facilities planning process, EDI's Educational Environment Assessment tools and benchmarking reviews will be used to evaluate the extent to which each facility supports wellness, belonging, instructional effectiveness, modern learning practices, flexibility, collaboration, student agency, and future adaptability.

The assessment tools will include:

- Health and Well-Being Quality Assessment
- Social and Emotional Readiness Assessment
- Educational Effectiveness Assessment
- Scale of Modernity Assessment

These tools will help RSU 5 understand how each facility supports the educational experience, where current spaces may limit future aspirations, and how targeted improvements could advance the district's Strategic Plan and long-term vision for teaching and learning.

The purpose of this review is to answer several key questions:

-
- Are district facilities appropriately supporting current and future educational programming?
 - Are facilities being utilized efficiently and effectively?
 - How well do current learning environments support student wellness, collaboration, flexibility, and modern instructional practices?
 - Where do facilities create constraints for current programs or future aspirations?
 - What targeted improvements could meaningfully enhance the student and staff experience?
 - How can facilities better support the district's Strategic Plan and Operational Excellence goals?
 - Are there opportunities to improve efficiency through facility, program, or operational realignment?

Facility Profiles

Zeal and EDI will develop a summative profile of each facility that may include:

- Building age
- Square footage
- Site acreage
- Original and current design capacity, where available
- Current enrollment and utilization rates
- Programmatic use
- Campus organization and circulation observations
- Educational environment strengths and challenges
- Historical capital investments, where available
- Known deferred maintenance obligations, where provided by the district
- Opportunities for future improvement
- Potential Pathfinder Project concepts

This inventory will establish a baseline understanding of each facility's role within the district and provide a foundation for future recommendations.

Community Design Spark Sessions

As part of the integrated engagement process, EDI, in partnership with Zeal, will facilitate Design Spark Sessions in each RSU 5 community. These sessions will be open to all members of the community to maximize participation.

These collaborative sessions will engage teachers, school leadership, support staff, district administrators, and other stakeholders identified by the district in envisioning the future of learning within each community. Each Design Spark Session will be approximately two hours and will include two components:

Component 1: Designing What Matters Presentation

EDI will facilitate an engaging presentation designed to inspire discussion and establish a common foundation for the planning process. Drawing on examples from leading educational institutions and innovative learning environments around the world, the presentation will explore emerging trends in education, evolving teaching and learning models, and ways in which school facilities can support student success, wellness, collaboration, creativity, and community engagement.

Through a combination of case studies, project examples, and thought-provoking ideas, participants will be encouraged to reflect on what matters most for their students and community, helping to frame subsequent discussions around future aspirations, priorities, and opportunities for their schools.

Component 2: Design Spark Workshop

EDI will facilitate a collaborative workshop to identify community priorities and aspirations.

Workshop outcomes will help define guiding principles for future planning efforts.

These Design Spark Sessions will serve as the primary in-person community visioning forums for the educational facilities planning portion of the study. Their findings will be integrated with Zeal's broader stakeholder engagement process, including leadership interviews, staff input, student voice opportunities, and ThoughtExchange participation.

School-Specific Discovery, Assessment, Visioning and Planning Reports

Following the completion of site assessments, programming meetings, Design Spark Sessions, and related stakeholder discussions, EDI will prepare a school-specific Discovery, Assessment, Visioning and Planning Report for each RSU 5 school.

The following reports will be included:

- Freeport High School
- Freeport Middle School
- Durham Community School
- Mast Landing School
- Morse Street School
- Pownal Elementary School

Each school-specific report will document existing conditions, capture stakeholder input, identify opportunities for improvement, and provide recommendations for future design and investment.

Each report will include the following components:

- Stakeholder Engagement Summary

-
- Documentation of key themes and priorities that emerged from leadership meetings, Design Spark Sessions, programming meetings, and stakeholder discussions.
 - Educational Environment Assessment Results
 - Summary findings from EDI's assessment tools, including the Health and Well-Being Quality Assessment, Social and Emotional Readiness Assessment, Educational Effectiveness Assessment, and Scale of Modernity Assessment. Results will be presented graphically to illustrate areas of strength and opportunities for growth.

Photographic Narrative

A visual assessment of the school documenting existing conditions through annotated photographs. This section will highlight strengths, challenges, opportunities, and observations related to learning environments, circulation, collaboration, wellness, flexibility, identity, and campus character.

Pathfinder Project Concept

Development of one illustrative Pathfinder Project for each school demonstrating how a targeted investment could advance educational goals and improve the student experience. Each Pathfinder Project will be communicated through conceptual diagrams, planning sketches, precedent imagery, and narrative descriptions intended to inspire future planning and discussion.

Integration with the Broader Systems and Sustainability Study

Zeal will synthesize EDI's school-specific findings into the final Systems and Sustainability Study. This integration will connect facilities observations with enrollment trends, demographic projections, grade configuration analysis, program placement, staffing structures, transportation considerations, operational efficiency, stakeholder feedback, and the district's emerging Strategic Plan.

This ensures that the facilities planning work does not stand apart from the larger study. Instead, facilities will be analyzed as part of one interconnected system that includes people, programs, buildings, transportation, finances, and community aspirations.

II. Grade and Program Alignment / Building Utilization Analysis

A critical component of long-range sustainability planning is ensuring that facilities, grade configurations, and program placements are aligned with current educational needs, future enrollment patterns, and the district's strategic priorities. Zeal will conduct a review of RSU 5's current grade-level configurations, program placements, and facility utilization patterns to determine whether existing structures continue to represent the most effective and efficient use of district resources.

The purpose of this analysis is not to begin with predetermined solutions, but rather to objectively evaluate whether the district's current organizational model best supports educational excellence, operational efficiency, student experience, and long-term sustainability.

Analysis of Grade and Program Alignment

Zeal will review the current placement of grade levels, instructional programs, and specialized services throughout the district to determine how effectively facilities support educational programming and student needs.

The analysis will examine:

- Current grade-level configurations across all schools
- Distribution of instructional programs throughout the district
- Placement of specialized academic, intervention, and support programs
- Alignment between facility design and program requirements
- Operational efficiencies associated with current grade configurations
- Opportunities to strengthen educational continuity and student transitions
- Impacts of demographic shifts on future program delivery
- Opportunities to improve access, equity, and consistency of services
- Facility implications identified through the educational environment assessments
- Community aspirations identified through Design Spark Sessions and stakeholder engagement

Particular attention will be given to understanding how current grade and program configurations support the district's emerging Strategic Plan and long-term vision for teaching and learning.

Building Utilization and Capacity Analysis

Zeal will evaluate how effectively each facility is being utilized relative to both current enrollment and projected future enrollment trends.

Using district-provided capacity data, enrollment information, demographic projections, and observations from the educational facilities planning process, the analysis will include:

- Current building enrollment and utilization rates
- Comparison of enrollment to functional building capacity
- Identification of underutilized and highly utilized spaces
- Analysis of enrollment distribution across schools
- Capacity implications associated with projected enrollment changes
- Facility utilization trends over time
- Programmatic demands affecting building utilization
- Potential future space needs based on enrollment projections
- Opportunities to improve flexibility, adaptability, and educational use of existing spaces

This review will help identify whether current facility utilization patterns align with projected student populations, educational priorities, and strategic goals over the next decade.

Scenario Planning and Future Options

Drawing upon findings from the enrollment analysis, demographic projections, facility review, EDI school-specific reports, stakeholder engagement process, and Strategic Plan alignment work, Zeal will develop planning scenarios that help district leaders and the Board of Directors understand potential future opportunities and challenges.

Potential scenarios may explore:

- Alternative grade configurations
- Program relocation opportunities
- Building utilization adjustments
- Early Childhood expansion considerations
- Enrollment growth or decline responses
- Opportunities to improve operational efficiency
- Targeted Pathfinder Project opportunities
- Long-term facility planning considerations
- Future investment priorities connected to educational visioning

Each scenario will be evaluated through multiple lenses, including educational impact, operational feasibility, community considerations, financial implications, facility readiness, and alignment with district priorities.

The objective is not to recommend change for the sake of change, but to provide RSU 5 with a clear understanding of how facility utilization, grade configurations, program placement decisions, and targeted facility investments may support long-term sustainability and Operational Excellence.

III. Transportation Logistics Assessment

Zeal will review district transportation operations to evaluate efficiency, sustainability, and alignment with current and future district needs.

The assessment will focus on:

- Routing and assignment practices
- Fleet maintenance and replacement planning
- Transportation facility, storage, and fueling infrastructure

The review will examine route efficiency, ride times, bus utilization, geographic coverage, bell schedule impacts, fleet condition, maintenance practices, operational costs, storage capacity, and facility adequacy. Particular attention will be given to the district's leased transportation facility and its long-term suitability.

The goal is to identify opportunities to improve operational efficiency while maintaining safe, reliable transportation services.

Infrastructure, Facilities, Utilization, and Transportation Deliverables

The Infrastructure and Logistics section of the final report will include:

- Facility profiles for each RSU 5 school and Central Office
- EDI educational environment assessment findings
- School-specific Discovery, Assessment, Visioning and Planning Reports
- Photographic narratives and annotated facility observations
- Identification of facility strengths, challenges, constraints, and opportunities
- Pathfinder Project concepts for each school
- Grade configuration, program alignment, and building utilization analysis
- Capacity comparisons against current and projected enrollment
- Analysis of program placement, specialized services, and student transition considerations
- Facility and program planning scenarios, where appropriate
- Transportation operations and logistics assessment findings
- Routing, assignment, fleet, storage, fueling, and facility observations
- Review of transportation facility suitability and long-term needs
- Opportunities to improve operational efficiency
- Capital planning considerations and cost implications, where applicable
- Short-, medium-, and long-term recommendations aligned with district priorities, enrollment trends, and community aspirations

The final recommendations will prioritize educational effectiveness, operational efficiency, fiscal responsibility, long-term sustainability, and alignment with RSU 5's Strategic Plan.

FUTURE PLANNING & ALIGNMENT

RSU 5's commitment to long-term sustainability extends beyond facilities and staffing decisions. Sustainable school systems align enrollment trends, community aspirations, educational programming, facilities, staffing structures, and financial resources within a shared strategic vision. Zeal's Future Planning and Alignment process is designed to help RSU 5 make informed decisions that support both current needs and future opportunities.

I. Integration with the Emerging Strategic Plan

Throughout the engagement, Zeal will utilize the district's emerging Strategic Plan as the organizing framework through which findings, analyses, and recommendations will be evaluated. Rather than viewing staffing, facilities, transportation, and financial resources as independent systems, Zeal will assess how these resources collectively support the district's long-term educational goals and community priorities.

This process will ensure that recommendations are not only operationally sound, but also aligned with RSU 5's vision for teaching and learning, organizational effectiveness, community engagement, and long-term sustainability.

Current Enrollment and Geographic Analysis

Zeal will conduct a comprehensive review of current enrollment patterns across the district. This analysis will examine enrollment by grade level, school, attendance area, and community to better understand how students are distributed throughout Durham, Freeport, and Pownal.

The analysis will include:

- Historical enrollment trends by grade and school
- Geographic enrollment patterns across the district
- Student distribution by community and attendance area
- Building-level enrollment comparisons
- Program enrollment trends, where applicable

This review will establish a baseline understanding of current enrollment conditions and identify emerging trends that may impact future planning decisions.

Demographic Analysis and Ten-Year Enrollment Projections

Zeal anticipates partnering with the New England School Development Council, NESDEC, or a similarly qualified New England-based demographer, to prepare ten-year enrollment projections and identify the demographic, housing, birth-rate, migration, and community factors affecting future enrollment in RSU 5.

While the demographic forecasting will be conducted by a specialized third-party expert utilizing established forecasting methodologies, Zeal will coordinate the process, provide district data, facilitate communication between the district and the demographer, analyze the resulting findings, and integrate all demographic conclusions into the broader Systems and Sustainability Study.

Using recognized demographic forecasting models, the study will analyze:

- Historical enrollment trends
- Birth rate data
- Housing development activity
- Housing turnover patterns
- Population migration trends
- Residential growth projections
- Community demographic changes
- Regional economic indicators

The resulting enrollment projections will provide ten-year forecasts by grade level and will serve as a critical planning tool for evaluating future facility utilization, staffing requirements, transportation needs, programming considerations, and capital investments.

Early Childhood Programming Evaluation

Recognizing the important role that Early Childhood programming plays within a comprehensive educational system, Zeal will evaluate current and future Early Childhood programming needs in the context of demographic trends, enrollment projections, and community expectations.

This review will consider:

- Current Early Childhood programming capacity
- Existing and projected demand
- Enrollment trends among preschool-aged children
- Facility implications associated with program expansion or modification
- Alignment with strategic priorities and community needs

The goal is to ensure that future planning efforts appropriately consider the role of Early Childhood education as part of a seamless educational continuum serving RSU 5 families.

II. Alignment of Resources with Operational Excellence

A central outcome of this study will be helping RSU 5 align its people, programs, facilities, and financial resources with its emerging Strategic Plan and long-term vision.

Zeal defines Operational Excellence as the intentional alignment of organizational structures, staffing, facilities, finances, and programming in support of student success.

Using findings from the organizational review, facility utilization analysis, demographic projections, transportation assessment, stakeholder engagement process, and strategic planning review, Zeal will identify opportunities to:

- Improve organizational efficiency and effectiveness
- Align staffing resources with current and future enrollment realities
- Optimize facility utilization and program delivery
- Support sustainable resource allocation decisions
- Prioritize future investments based on strategic goals
- Strengthen long-term financial sustainability
- Enhance alignment between district operations and educational priorities

Recommendations will be evaluated through multiple lenses, including educational impact, operational feasibility, financial sustainability, and community alignment.

The result will be a practical roadmap that helps RSU 5 make informed decisions regarding facilities, staffing, programming, and resource allocation while remaining grounded in community values and the district's strategic vision for the future.

Future Planning and Strategic Alignment Deliverables

The Future Planning and Alignment section of the final report will include:

- Strategic Plan alignment analysis
- Current enrollment and geographic enrollment profile
- Historical enrollment trend analysis
- Ten-year enrollment projections prepared by a qualified third-party demographer
- Analysis of housing, migration, birth rate, residential growth, and demographic trends
- Early Childhood programming assessment
- Analysis of Early Childhood capacity, projected demand, and facility implications
- Operational Excellence framework connecting facilities, staffing, transportation, programming, finances, and educational priorities
- Resource alignment analysis supporting long-term sustainability
- Evaluation of future facility, staffing, transportation, and programming implications
- Strategic planning scenarios and decision-making considerations
- Financial, operational, educational, and community impact analysis of major recommendations, where applicable
- Prioritized short-, medium-, and long-term recommendations
- Long-range sustainability roadmap

The final recommendations will help RSU 5 align its people, programs, facilities, finances, and operations with its Strategic Plan while supporting educational excellence, fiscal responsibility, and long-term sustainability.

Final Systems and Sustainability Study Deliverables

Zeal will synthesize all findings from the organizational analysis, staffing review, facilities planning work, educational environment assessments, grade and program alignment review, transportation assessment, demographic projections, stakeholder engagement process, and Strategic Plan alignment analysis into a comprehensive final report.

The final Systems and Sustainability Study will include:

- Executive summary
- Summary of methodology and data sources
- Integrated findings across all major study areas
- Organizational and staffing analysis
- Facilities and educational environment analysis
- School-specific facility planning summaries
- Grade configuration, program alignment, and building utilization findings
- Transportation logistics findings
- Current enrollment and demographic analysis
- Ten-year enrollment projections
- Early Childhood programming implications
- Stakeholder engagement findings
- Operational Excellence framework
- Scenario analysis and planning considerations
- Financial, operational, educational, and community implications, where applicable
- Prioritized short-, medium-, and long-term recommendations
- Long-range sustainability roadmap
- Final presentation materials for the Board and/or public bodies identified by RSU 5

The final report will be designed to support informed decision-making by district leaders, the Board of Directors, staff, families, taxpayers, and the broader RSU 5 community.

OUR TEAM

RSU 5 is not seeking a traditional facilities assessment, enrollment study, or organizational review. The district is seeking a comprehensive understanding of how its people, programs, facilities, transportation systems, and financial resources can be aligned to support long-term sustainability and educational excellence.

This type of work requires more than technical expertise. It requires professionals who have led school districts, managed budgets, navigated changing enrollment patterns, engaged communities in difficult conversations, supervised transportation and facilities operations, developed strategic plans, and implemented organizational change.

Jeff Melendez, Ed.D. | Founder & CEO
Zeal Education Group



Dr. Jeff Melendez is the Founder and CEO of Zeal Education Group and brings more than 25 years of experience serving students, educators, and communities in public education. His career includes leadership roles in high-performing school districts throughout Westchester County, New York and Fairfield County, Connecticut, including six years as a superintendent. In addition to his district leadership experience, Dr. Melendez has served as an Adjunct Professor at Teachers College, Columbia University for more than a decade, supporting the development of aspiring and practicing educational leaders. Beyond his work in schools, he has founded and led multiple for-profit and nonprofit organizations focused on leadership development, executive coaching, and youth services.

Dr. Melendez serves on advisory boards for several educational technology companies and regularly collaborates with organizations seeking to strengthen leadership capacity and organizational effectiveness. He is the co-author of a chapter in *A New Language for School Design*, which explores the relationship between physical and psychological safety in learning environments. Dr. Melendez earned his M.A., Ed.M., and Ed.D. from Teachers College, Columbia University and is certified by the National Board for Professional Teaching Standards.

Dr. Andrew Dolloff | Senior Associate
Zeal Education Group



Dr. Andrew Dolloff is a veteran educational leader with more than thirty years of experience as a teacher, coach, school administrator, superintendent, author, and university instructor. He recently completed twenty years as a superintendent across two school districts recognized for performance, efficiency, and organizational effectiveness. Earlier in his career, he served as a chemistry teacher and basketball coach before advancing into school and district leadership roles. Dr. Dolloff has led three National Blue Ribbon Schools of Excellence and has been recognized by state and regional organizations for practical and innovative leadership. He is the author of *The Trust Imperative* and *Leading with Intent*, both published by AASA and Bloomsbury, and his writing has led to speaking and consulting engagements throughout the United States. He teaches graduate education at the University of Southern Maine, where he has chaired the Educational Leadership Advisory Board since 2019. His professional service includes membership on the International Advisory Board for the Harvard Graduate School of Education's Principals' Center and service as Board Chair for the New England School Development Council. Dr. Dolloff earned his Ph.D. in Public Policy and Educational Leadership from the University of Southern Maine, where his dissertation focused on resource allocation in higher-performing school districts.

Prakash Nair, AIA | Associate
Zeal Education Group



Prakash Nair is an internationally recognized architect, educational futurist, author, and thought leader whose work has shaped school design and educational environments around the world. He is the Founding President and CEO of Education Design International (EDI), an organization that integrates architecture, education, neuroscience, environmental science, psychology, and child development to support innovative learning environments. Prior to founding EDI, he served for sixteen years as the Founding President and CEO of Fielding Nair International, helping build the organization into one of the world's leading educational design consultancies with projects spanning 52 countries across six continents. Earlier in his career, he directed operations for one of the largest public school construction programs in the world in New York City. Mr. Nair is the recipient of numerous international honors, including the A4LE MacConnell Award, widely regarded as the highest distinction in educational facility planning and design. He has authored several influential books, including *Learning by Design*, *The Language of School Design*, and *Blueprint for Tomorrow: Redesigning Schools for Student-Centered Learning*, published by Harvard Education Press. His writing and research have been featured extensively in international journals focused on education, leadership, and design. He has also served as an instructor for HarvardX's Leaders of Learning program, helping educators and leaders examine theories of learning, innovation, and organizational change.

Dr. Joseph S. Micheller | Senior Associate
Zeal Education Group



Dr. Joseph S. Micheller is an educational leader whose career has focused on district transformation, innovation, and the development of new learning models. Most recently, he served as Executive Director of New School Development for Cleveland Metropolitan School District, where he worked with educators and community partners to design, launch, and support more than thirty innovative school models. Prior to his work in Cleveland, Dr. Micheller served as a superintendent, assistant superintendent for human resources, director of educational services, and middle school teacher.

Throughout his career, he has led and secured major grant initiatives, including projects exceeding \$10 million in funding and the district's \$6 million Opportunity by Design award from the Carnegie Corporation of New York. His professional learning experiences include participation in executive leadership programs through Harvard University and the Center for Creative Leadership. Dr. Micheller's work has consistently centered on redesigning systems of teaching and learning to better meet the needs of students and communities. He earned degrees from Cleveland State University and a Doctor of Education degree from the University of Akron.

Richard Katz, Ed.D. | Senior Associate
Zeal Education Group



Dr. Richard Katz is a former superintendent and human resources director with deep experience in leadership, organizational effectiveness, change management, and district operations. Throughout his career, he has worked closely with boards of education, executive teams, staff, and communities to strengthen systems, raise expectations, and improve organizational coherence. His leadership experience includes guiding districts through periods of structural, financial, and operational complexity, including work involving resource alignment, human capital challenges,

communication systems, and long-term planning. Dr. Katz has helped leadership teams confront difficult realities with clarity, transparency, and disciplined processes while maintaining focus on students, staff, and community priorities. His professional background provides a practical perspective on the interconnected responsibilities of governance, personnel, finance, and organizational culture. He earned his doctorate in Educational Administration and Supervision from Rutgers University, a master's degree in Educational Administration and Supervision from Montclair State University, and a bachelor's degree in Journalism from The Ohio State University. He also completed the Superintendent Leadership Institute at the Harvard Graduate School of Education.

**Louis Sirota, AIA | Associate
Zeal Education Group**



Louis is a visionary architect with more than twelve years of international experience designing future-forward educational environments that empower students and communities. His work combines creative problem-solving, critical thinking, collaboration, communication, and adaptability. He believes architecture is a tool for transformation, creating spaces that support learning, connection, innovation, sustainability, creativity, and lifelong growth.

Louis works closely with schools from master planning through construction to create environments rooted in local context and aligned to each community's educational goals. His portfolio includes Beijing No1 Experimental School, The Learning Campus in Tianjin, Strathcona Tweedsmuir School in Alberta, Sherman Inspire Academy, Finland Global School, Sankore International School, and the NEOM education initiative. His work across 20 countries reflects his ability to blend innovative design, local vernacular, and diverse educational philosophies. He has keynoted domestic and international conferences, presented white papers on school design and the psychology of learning environments, contributed to MIT research on campus building energy efficiency, and brings residential architecture experience and licensure in multiple U.S. states. Louis holds a Master of Architecture and a Bachelor in Environmental Design from North Dakota State University. A lifelong outdoor enthusiast, trail runner, and competitive Nordic skier, he draws inspiration from the natural world to design spaces that connect people to their environments, promote well-being, and help education and community thrive.

**Danielle McCarthy | Associate
Zeal Education Group**



Danielle is a Michigan-based Senior Interior Designer with Education Design International. She has over ten years of experience as an interior designer, with the majority of her practice focused on K-12 and higher education markets. Her passion for design directly aligns with the impact created for those who experience the environments she helps shape. She believes spaces should inspire and support continuous learners and future leaders, encouraging them to pursue their own passions.

Prior to joining Education Design International, Danielle was an integral team member at Fielding Nair International, where she helped develop innovative 21st-century learning environments in the United States and throughout the world. She supported projects from concept development, to schematic design, to final physical spaces.

Danielle worked with architectural teams to lead client discovery meetings, identify school needs, and help develop master plans that encompassed future projects. Danielle holds both a Bachelor of Architecture and a Bachelor of Arts in Interior Architecture from Lawrence Technological University in Southfield, Michigan. She is also a LEED AP, a Leadership in Energy and Environmental Design Accredited Professional.

REVISED INVESTMENT OPTIONS

Investment Option A: $\\$186,000 (- \\$36,000) = \\$150,000$ No reduction in scope. This option includes the full study as proposed with a courtesy discount of \$36,000. Key benefits include: • Direct Zeal participation in Community Design Spark Sessions. • Comprehensive in-person stakeholder engagement and leadership interviews. • Full demographic projections and enrollment analysis. • Strongest ability to connect organizational, facility, enrollment, and community findings. • Greatest opportunity to validate findings through multiple data sources and stakeholder perspectives. • Most comprehensive set of recommendations and implementation considerations. • Inclusion of the requested Energy Audit review	Investment Option B: $\\$150,000 (- \\$1,000) = \\$149,000$ This option reduces the depth of in person organizational analysis and enrollment forecasting while maintaining the full facilities assessment. Compared to Option A, the following elements are reduced or eliminated: • Community Design Spark Sessions will be facilitated by EDI <u>without</u> direct Zeal participation. • Zeal will still receive and incorporate findings from the sessions into the study. • Some stakeholder and department meetings will be conducted <u>virtually rather than in person</u>. • <u>Reduced opportunity for Zeal to observe discussions, interactions, and facility operations firsthand.</u> • Enrollment analysis will <u>focus on essential trends and planning considerations rather than comprehensive demographic forecasting.</u> • Recommendations will continue to be informed by community input, organizational findings, and facilities analysis, but with <u>less direct Zeal involvement during portions of the engagement process.</u>	Investment Option C: $\\$149,000 (- \\$1,000) = \\$148,000$ This option provides the most streamlined approach and focuses primarily on facilities and organizational review through summary communications and virtual participation. In addition to the reductions presented in Option B, the following elements are reduced or eliminated: • Most stakeholder and department meetings conducted by Zeal will occur <u>virtually</u>. • <u>Enrollment analysis will be limited to existing district enrollment data</u> and information provided by RSU 5.
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**In addition to the service fees, we will bill reasonable travel expenses at the completion of the project.*

References:**RSU 21**

Reference: Martin Grimm, Superintendent of Schools

Phone: (207) 985-1100 | Email: mgrimm@rsu21.net

Services: Operational Efficiency Review

Project Completed: 2026

Region 15 Public Schools

Reference: Joshua Smith, Superintendent of Schools

Phone: (203) 758-8259 | Email: jsmith@region15.org

Services: Strategic Planning / Portrait of a Graduate / Community Engagement

Project Completed: 2024

Yarmouth School Department

Reference: Christina Patrick, School Department Chair

Phone: (207) 329-0396 | Email: christina.patrick@yarmouthschools.org

Services: Superintendent Search and Community Engagement

Project Completed: 2026

COMPLETION TIMELINE

Zeal understands RSU 5's desire to complete the study by November 20, 2026, and believes this timeline is achievable.

Phase I: Discovery and Data Collection	July 2026
Phase II: Stakeholder Engagement and Site Assessments	July-Sept. 2026
Phase III: Organizational, Facilities, Transportation, and Demographics	Aug.-Sept. 2026
Phase IV: Development of Findings, Scenarios, and Recommendations	Sept.-Oct. 2026
Phase V: Draft Report Review and Refinement	Oct.-Nov. 2026
Phase VI: Final Report and Presentations	Nov. 2026

If this proposal is accepted, payment of 25% is requested upon signing of contract, 50% upon presentation of draft report, and the final 25% plus any reimbursements for travel and expenses to be made upon delivery of the final report/presentation.

SCOPE CLARIFICATIONS AND EXCLUSIONS

Zeal and EDI will provide an integrated Systems and Sustainability Study that includes organizational analysis, staffing review, transportation review, demographic forecasting, stakeholder engagement, educational facilities planning, learning environment assessment, Design Spark Sessions, school-specific planning reports, and long-range sustainability recommendations.

Please note that this proposal does not include the following items listed in the RFP:

- Comprehensive physical condition assessments, including structural, mechanical, plumbing, electrical, accessibility, environmental, civil, or site engineering evaluations
- ~~Review of the existing Energy Audit plan for facilities upgrades and alignment of proposals with that plan.~~
- Formal architectural design documents for proposed new buildings or renovations
- Schematic design packages, construction documents, or bid-ready architectural plans
- Detailed construction cost projections or professional cost estimating for any recommendations

While Zeal and EDI will provide educational facilities planning analysis, annotated photographic narratives, Pathfinder Project concepts, conceptual diagrams, planning sketches, precedent imagery, and narrative recommendations, the omitted items above would require additional architectural, engineering, environmental, or cost-estimating services beyond the current scope, timeline, and budget.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
01/21/2026

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER BIBERK P.O. Box 113247 Stamford, CT 06911	CONTACT NAME: PHONE: 844-472-0967 FAX: 203-654-3613 E-MAIL: customerservice@bIBERK.com ADDRESS:
INSURED Zeal Education Group, LLC 800 N King S Ste 304 2029 Wilmington, DE 19801-7550	INSURER(S) AFFORDING COVERAGE INSURER A: Berkshire Hathaway Direct Insurance Company INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTH	TYPE OF INSURANCE	ADDITIONAL SUBR R/SO / WYS	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY ☐ PRO-JECT ☐ LOC OTHER:					EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (EA occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY HIRED AUTOS ONLY SCHEDULED AUTOS NON-OWNED AUTOS ONLY					COMBINED SINGLE LIMIT (EA accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	UMBRELLA LIAB ☒ OCCUR EXCESS LIAB CLAIMS-MADE DED RETENTION \$		N9UM616351	01/21/2026	01/21/2027	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000 \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N ☐ N/A				PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
	Professional Liability (Errors & Omissions): Claims-Made					Per Occurrence/ Aggregate

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

Zeal Education Group, LLC
800 N King S Ste 304 2029
Wilmington, DE 19801-7550

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Patel Gup

ACORD 25 (2016/03)

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