

*Law Director*  
THOMAS LOBE, L.P.A.

*Director of Finance*  
FRANK J. BRICHACEK, JR.

*Assistant Finance Director*  
DEBBIE DOLES

*Engineer*  
RICHARD IAFELICE, P.E., P.S.

*Building Commissioner*  
FRED WYSS, JR.

*Safety Director*  
ROBERT M. WEGER

# City of Willoughby Hills

35405 Chardon Road, Willoughby Hills, Ohio 44094-9195  
Phone (440) 946-1234 FAX 975-3535

Robert M. Weger, Mayor

*Council*  
CHRISTOPHER L. BIRO  
NANCY E. FELLOWS  
DAVID M. FIEBIG  
FRANK A. GERMANO  
KEVIN D. MALECEK  
DAVID A. REICHEL  
RAYMOND C. SOMICH

*Council Clerk*  
VICTORIA A. SAVAGE, CMC

February 23, 2012

Lake County Educational Service Center  
Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

Dear Sirs:

As Mayor for the City of Willoughby Hills, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the tax payer dollars in the wisest way.

There is a new role for Educational Service Centers. In meetings that have been conducted across the state, Randy Cole, Controlling Board President and Policy Advisor, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs."

It is envisioned that Regional Shared Services Centers will be created by merging the various regional service providers. The Lake County Educational Service Center has established the Lake County Shared Services Regional Cooperative.

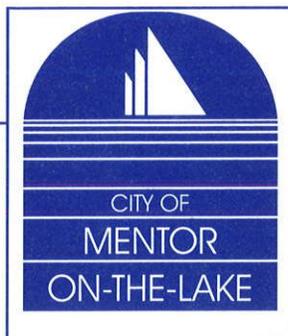
The City of Willoughby Hills and I support, endorse and will promote and participate in the important work of the Lake County Shared Services Regional Cooperative.

Sincerely,



Robert M. Weger, Mayor

RMW:gm



*Mayor/Safety Director*  
**JOHN M. ROGERS**

*Council President*  
ANDREW M. ROSE

*Council Vice President*  
DAVID R. EVA

*Members of Council*  
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TROY D. ELAM

JOHN HAWKINS

DALE O. LANGBEHN

SUSAN M. SHIRLEY

*Administrative Director*  
KIP L. MOLENAAR

*Law Director*  
JAMES M. LYONS

*Police Prosecutor*  
JOSEPH M. GURLEY

*Engineer*  
JAMES SAYLES

*Fire Chief*  
ROBERT J. MAHONEY

*Police Chief*  
JOHN P. GIELINK

*Service Director*  
DWAYNE E. BAILEY

WEB: [www.CityMOL.org](http://www.CityMOL.org)

February 22, 2012

Dr. Brian Bontempo, Superintendent  
Lake County Educational Service Center  
Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

Dear Dr. Bontempo:

As Mayor for the City of Mentor-on-the-Lake, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the tax payer dollars in the wisest way.

There is a new role for Educational Service Centers. In meetings that have been conducted across the state, Randy Cole, Controlling Board President and Policy Advisor, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs."

It is envisioned that Regional Shared Services Centers will be created by merging the various regional service providers. The Lake County Educational Service Center has established the Lake County Shared Services Regional Cooperative.

I support, endorse and will promote and participate in the important work of the Lake County Shared Services Regional Cooperative.

Sincerely,

John M. Rogers, Mayor  
City of Mentor-on-the-Lake

JMR/lms



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Brian Bontempo, Ed.D., Superintendent

ATTACHMENT 1

April 27, 2011

Name

Address

City, State, Zip

Dear

In this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the tax payer dollars in the wisest way. Now that the Governor's agenda is moving forward, there is a new role for Educational Service Centers. In meetings being conducted across the state, Dr. Robert Sommers, the new Director of the Governor's Office of 21<sup>st</sup> Century Education, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs." It is envisioned that Regional Shared Services Centers will be created by merging the various regional service providers. The Lake County ESC Governing Board has directed me to proceed on the exploration of this program and has appointed Dr. Ronald L. Victor to study and develop the program.

In an effort to be proactive, I invite you to join with me to explore and develop a model in Lake County with the above in mind. This meeting will be held at the Lake County Educational Service Center located at 382 Blackbrook Road on May 27 at 9:30 a.m. At this meeting we will introduce concepts and explain how we can begin to develop such a program of shared services for Lake County.

Please RSVP your attendance to Becky Tressler at [rtressler@lakeesc.org](mailto:rtressler@lakeesc.org) or call (440) 350-2563, Ext. 734.

Sincerely,

Dr. Brian Bontempo  
Superintendent, Lake County Educational Service Center

Meeting notes September 16, 2011

Program Opportunity 1

- Sharing Trade Services- Internal/External
- Capital Projects/Service side combine hours-Roof, Drive, Snow, Lands., IT
- Copiers
- Paper
- Waste

Data needed

- Category information-top spend
- Group/individual opportunities

Process

- Need 1<sup>st</sup> win
- Start with low threat
- Open to large areas for greater impact

Program Opportunity 2

Technology

- Blending
- Network Mgmt.
- IT Services and Hardware
- Cloud Computing

Keep Separate

1. IT Services
2. Hardware
3. Training

## Data Needed

### Needs assessment

- Personalized
- Level of services
- Growth year plans
- Replacement plans

## Process

### Rules of Engagement

- Visit districts/communities to review existing resources
- Mobil technology
- Determine current networks service providers

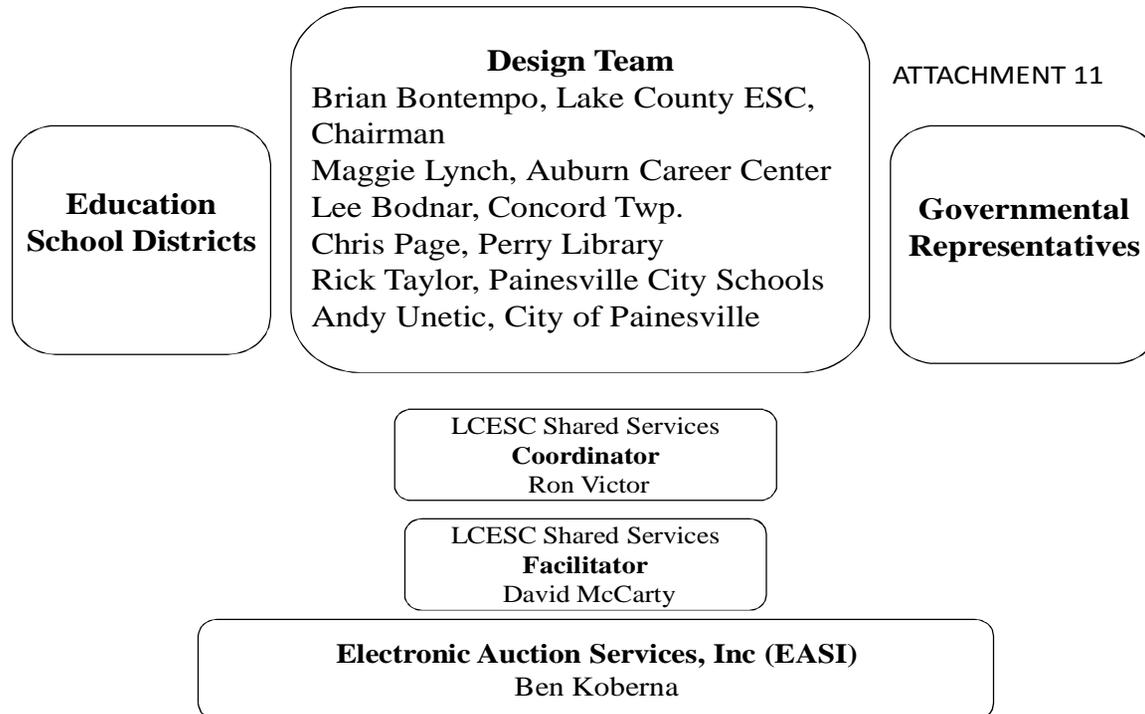
## Resources to contact for advised/answers

- OSC Council for past project work
- Call in County ITC
- Third Frontier
- One Community
- Rich Dugger

## Concerns

- Expectations
- Vendor resistance
- Expertise on our side

## Lake County Regional Cooperative Model



**1. Are you willing to utilize Shared Services to improve your supply base and save money?**

- Are you willing to utilize Shared Services to improve your supply base and save money? Yes  No

**2. If a new service or product were available today, how likely would you be to use it instead of competing services or products currently available from on your own?**

- If a new service or product were available today, how likely would you be to use it instead of competing services or products currently available from on your own? Very likely
- Slightly likely
- Extremely likely
- Not at all likely
- Moderately likely

**3. What services or products from the list would your organization consider if included in a shared services program?**

- What services or products from the list would your organization consider if included in a shared services program? HVAC maintenance
- Roof repair
- IT services
- Computer maintenance
- Laptops
- Monitors
- Software licenses
- Paper
- Copiers
- Office supplies
- Food services
- Fuel
- Propane
- Natural gas
- Electricity

- Insurance
- Commercial liability
- Custodial and maintenance services
- Janitorial supplies
- Vehicles
- Street or parking lot repairs
- Snow removal
- Lawn care
- Waste removal

# Reverse Auction Services Presentation

Utilizing technology to drive lower costs to government  
purchasing



# Agenda



## Electronic Reverse Auction (E-RA)

- “ Reverse Auction 101
- “ The Implementation Process
- “ Buyer and Supplier Screen Shots
- “ Opportunities & Savings Areas

# Reverse Auction 101

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What is a Reverse Auction?

A reverse auction is a **PRICING TOOL**

It is an online and cloud-based platform  
where suppliers bid against each other in real-time  
by placing multiple lowering bids  
in order to achieve a virtual first place  
at the conclusion of a defined time period

Pricing is obtained online  
rather than in traditional method



# Reverse Auction 101

## Electronic Pricing . Transparency, Integrity & Competitiveness

No disruption to the bid process while driving competitive pricing

- “ Bid duration is customizable . driven by bid complexity
- “ Event is extendable typically in last 3 minutes . avoid bid snipping
  - “ Vendors / Suppliers see rank, price or both
    - “ Comprehensive audit trail is created
      - “ Buyer sees every bid placed
      - “ Buyer can opt not to award
- “ Solution is vendor funded or buyer funded

# Reverse Auction 101

Electronic Reverse Auctions (E-RAs) are a web-based tool that allow multiple suppliers to submit bids/pricing against each other in real-time for services or commodities.

“The goal is to create a competitive environment to drive significant savings across a vast array of commodities and services.

“Buyer selects and qualifies suppliers to participate in a closed bidding environment.

“The suppliers place multiple lowering bids to arrive at a virtual first place.

“Supplier bid increments are predetermined and can be customized.

# Reverse Auction 101

- “ Bidding event can be rank only: where bidders can only see their price and rank - names of all other bidders are anonymous.
- “ Open bid: bidder can see their price, rank and all other prices entered - names of bidding companies are anonymous
- “ Buyer sees all bids, rank, and names of bidding companies
- “ Typical event duration is 30 minutes with 3 minute extensions this is flexible.
- “ Buyer awards business based on its own determining factors.

# Reverse Auction 101

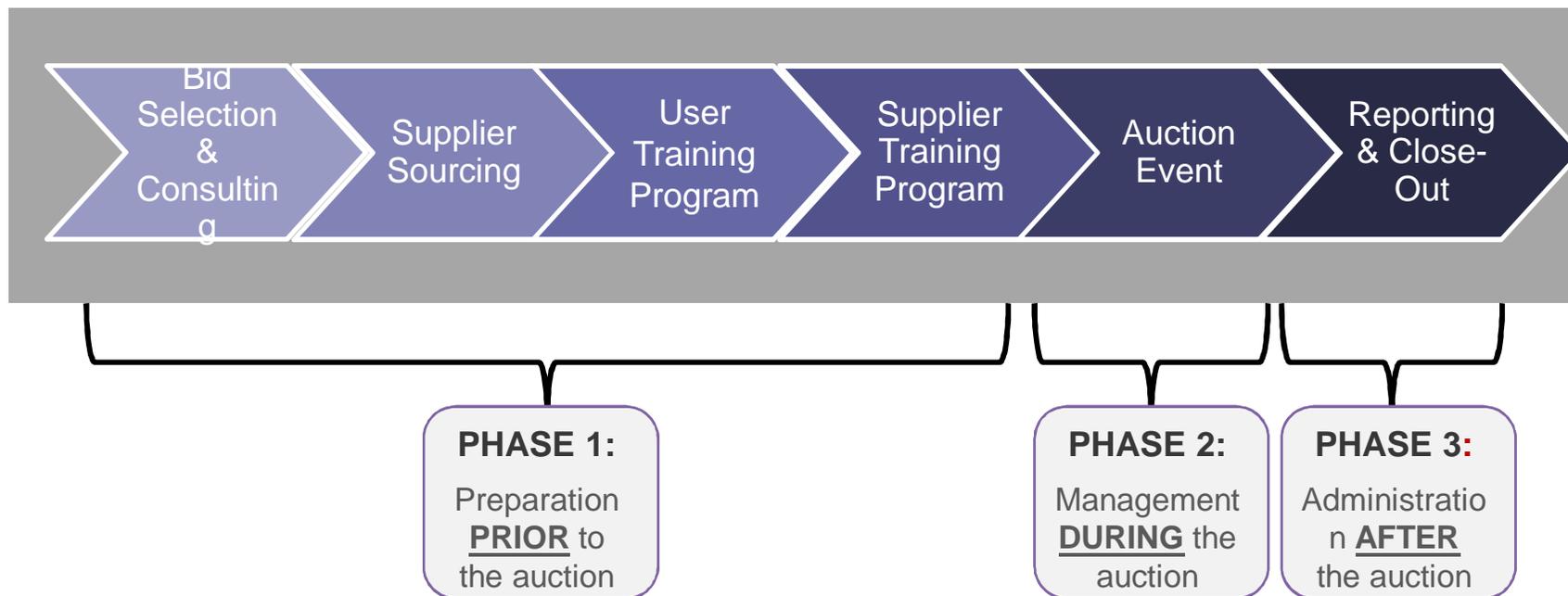
## The benefits of E-RAs are:

- “Increased efficiency and competitive through strategic sourcing component of the E-RA solution
- “Transparency brought to the procurement process
- “Increased number of bids
- “Cost-savings to the Client

# The Implementation Process

A strong technology platform combined with front-end specification and professional sourcing services

✓ EASI is a partner through life-cycle of procurement process



# Bid Strategy with Managed Services

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The services offered are:

- "RFP Design
- "Market Research
- "Vendor Qualification
- "Strategic Sourcing
- "Bid Strategy
- "Bid Management

EASI provides complete bid management including focused sourcing and bid package development.

# The Implementation Process



*Each Reverse Auction Event has a Project Plan with 6 categories:*

CATEGORY 1: Identifying Opportunities

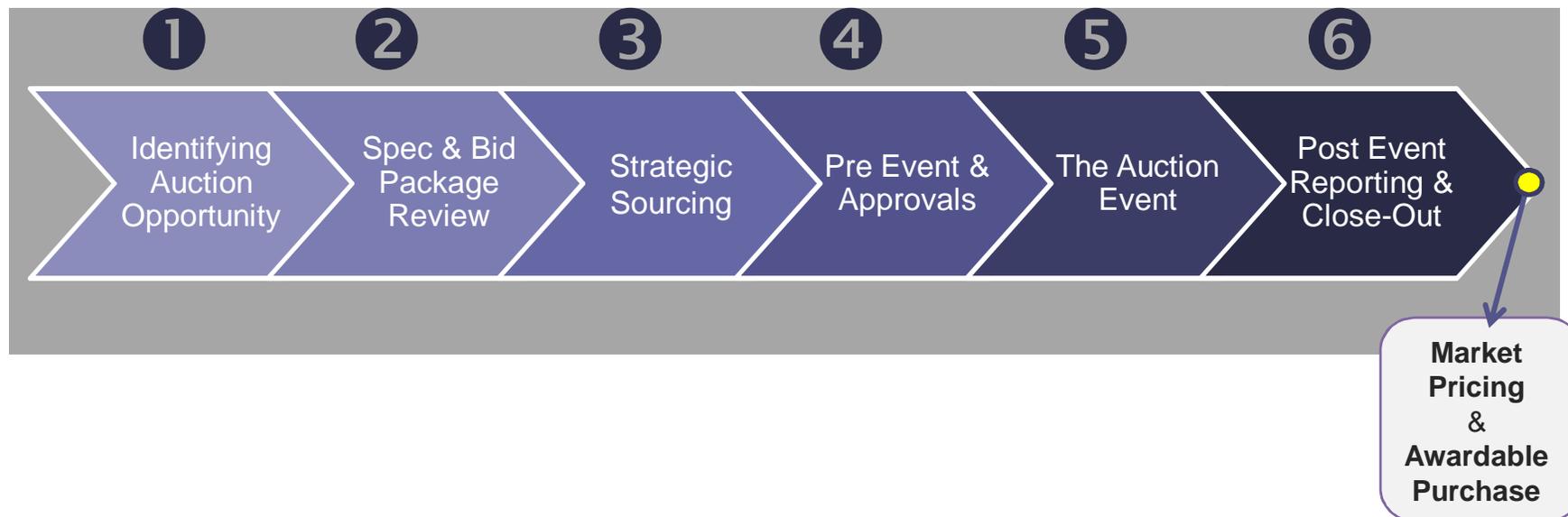
CATEGORY 2: Spec & Bid Package Review

CATEGORY 3: Strategic Sourcing

CATEGORY 4: Pre-Event & Approvals

CATEGORY 5: Reverse Auction event

CATEGORY 6: Post-Event & Reporting



# Project Plan

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## CATEGORY 1: Identifying Opportunities:

“Initial Evaluation of Auction opportunity . vetting for success

“Determination of **Go** or **No-Go** disposition

“Kick Off Call

- “ To discuss specifics of opportunity and develop bid strategy
- “ Define Project timeline and milestone dates
- “ Identify key stakeholders

EASI provides complete RFx management to aid in procuring a product, service or project.

# Project Plan

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## CATEGORY 2: SPEC & BID PACKAGE

- “ Project Charter
  - “ Business Case
  - “ Goal Statement
  - “ Problem/Opportunity Statement
  - “ Scoping Docs
  - “ Technical Specs
  - “ Used in developing RFx
  - “ Supplier Criteria
  
- “ Bid Package
  - “ Assembled and sent to Stakeholder for review
  - “ Begin Sourcing Activities

## CATEGORY 3: STRATEGIC SOURCING

“Cost Analysis

- “ Total Cost of Ownership (Bid Weighting)

“Market Analysis

“Capabilities and Trends

“Marketplace fluctuations

“Type of Sourcing

- “ Domestic/International
- “ Pre-qualification requirements
  - “ Financial
  - “ Capabilities
  - “ Price Point Entry
  - “ Compliance (required forms / wbe/mbe / EDS, etc)

“Risk assessment

“

“KPI (Key Performance Indicator) reports sent to stakeholders throughout the process

EASI prides itself in bringing motivated competitive bidders to bids by ensuring that each bidder is communicated with personally and aided in the response process

## CATEGORY 4: PRE-EVENT & APPROVALS

- “Pre-Qualified list of supplier submitted to Stakeholder
- “RFx released to pre-qualified supplier market
- “Reverse Auction built in the system
- “Stakeholder review and approval of the Reverse Auction event layout including baselines
- “Suppliers return RFx bid response without pricing
- “Supplier response review completed and suppliers approved to participate in Reverse Auction
- “Final supplier approval and official invites to the Reverse Auction
- “Tutorials (One on One training) with each of the approved vendors prior to the live event
- “Stakeholder tutorial on accessing the platform to view the Reverse Auction

Our Bid Development incorporates the specific internal requirements of the stakeholders with our experience in ensuring that your specifications are designed to ensure as competitive a reverse auction event as possible.

## CATEGORY 5: REVERSE AUCTION EVENT

### "Placeholder bids

- " Approved suppliers are required to enter their initial bid prior to the start of the Reverse Auction event

### "Actual event start time

- " Pre-determined duration with extensions

### "Operations and Tech center monitors event

### "Stakeholder logs into to see results real time

- " EASI will proctor event with stakeholder is requested

## CATEGORY 6: POST-EVENT

"Executive summary along with final bid tabulations submitted to stakeholder

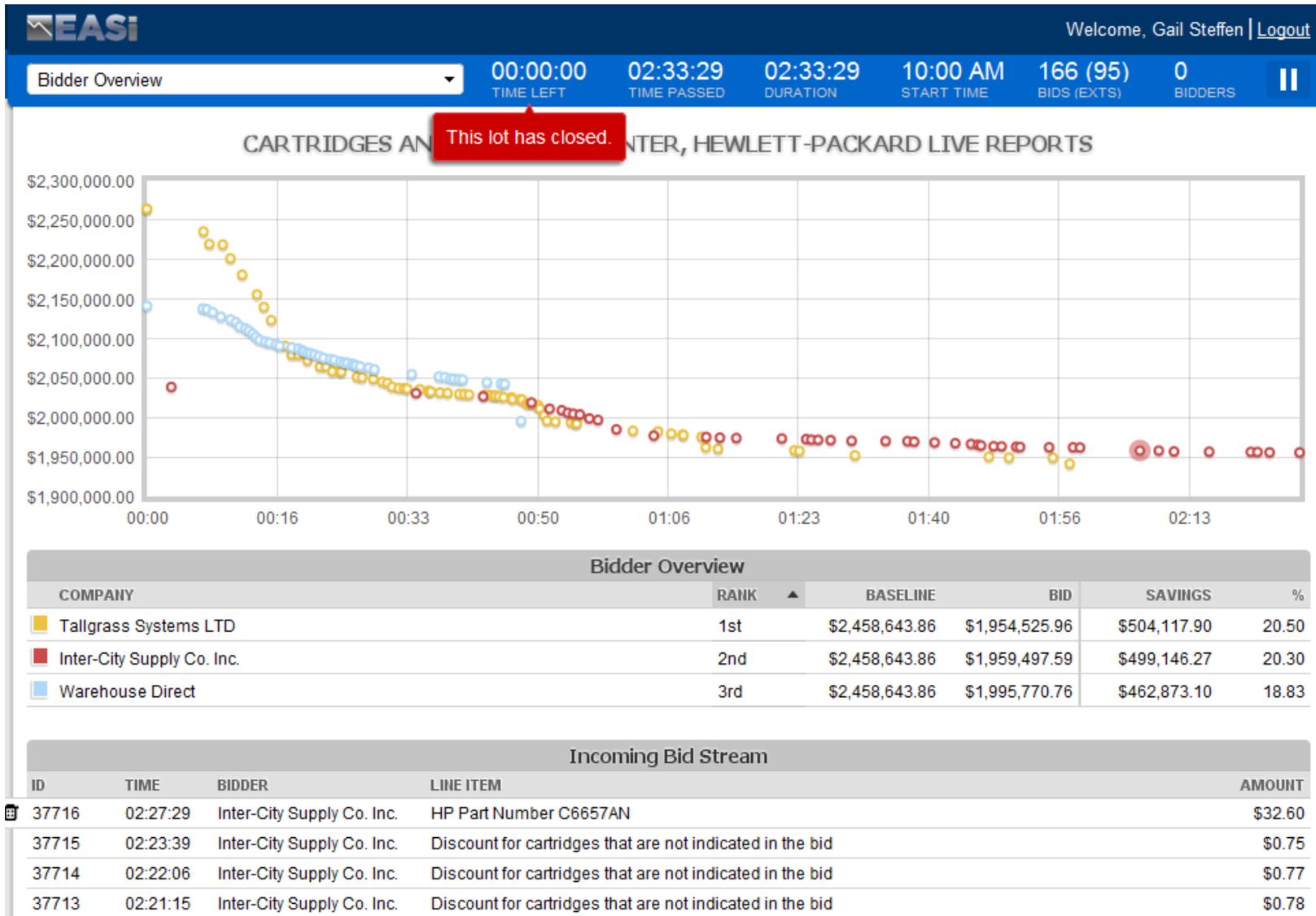
"Final interviews coordinated with suppliers

"Stakeholder award procedures

"Survey to suppliers

"Debrief and lessons learned+call with Stakeholders

# Reverse Auction Interface . Buyer View



# Reverse Auction Interface . Bidder View

EASI		Welcome, Gail Steffen   <a href="#">Logout</a>				
CARTRIDGES AND SUPPLIES, PRINTER, HEWI		02:33:29	02:33:29	10:00 AM	Reverse	
		TIME LEFT	TIME PASSED	DURATION	START TIME	AUCTION TYPE
RANK	ITEM	BID		EXTENDED QTY		
n/a	<b>HP Part Number Q2612A</b> 1/CARTON   #1.0   <a href="#">Description</a>	\$64.00 Min Decrement \$0.20	↑ * ⌵	<input type="text"/> Enter an amount	Extended Qty: 241	
n/a	<b>HP Part Number Q2612AD</b> 1/BOX   #2.0   <a href="#">Description</a>	Lead Bid (ALL) \$115.00 Min Decrement \$0.35	↑ * ⌵	<input type="text"/> Enter an amount	Extended Qty: 25	
n/a	<b>HP Part Number Q7553A</b> 1/CARTON   #3.0   <a href="#">Description</a>	Lead Bid (ALL) \$73.00 Min Decrement \$0.20	↑ * ⌵	<input type="text"/> Enter an amount	Extended Qty: 69	
n/a	<b>HP Part Number Q7553X</b> 1/CARTON   #4.0   <a href="#">Description</a>	Lead Bid (ALL) \$135.00 Min Decrement \$0.40	↑ * ⌵	<input type="text"/> Enter an amount	Extended Qty: 29	
n/a	<b>HP Part Number Q7553XD</b> 1/BOX   #5.0   <a href="#">Description</a>	Lead Bid (ALL) \$246.00 Min Decrement \$0.75	↑ * ⌵	<input type="text"/> Enter an amount	Extended Qty: 10	
n/a	<b>HP Part Number CE505A</b> 1/CARTON   #6.0   <a href="#">Description</a>	Lead Bid (ALL) \$74.00 Min Decrement \$0.25	↑ * ⌵	<input type="text"/> Enter an amount	Extended Qty: 165	
n/a	<b>HP Part Number CE505X</b> 1/CARTON   #7.0   <a href="#">Description</a>	Lead Bid (ALL) \$131.70 Min Decrement \$0.40	↑ * ⌵	<input type="text"/> Enter an amount	Extended Qty: 124	



# Opportunities & Savings Areas

## Bid Examples

<b>Auction</b>	<b>Savings %</b>	<b>Auction</b>	<b>Savings %</b>
Hangers	39.2%	Loyalty Cards	43.5%
Data Entry - Outlet Loyalty One Card	17.2%	PC Replacement & New	12.9%
Field Vehicles	7.5%	Laptop Replacement & New	17.7%
Insert Printing	0.7%	PC & Laptop Imaging & Asset Tagging	22.9%
Towels, Bath Mats, Wash Clothes	50.1%	eCommerce Server	19.9%
Trailer Graphics	31.8%	Dmarc, Extensions, Cabling, EUS Services	45.9%
Maintenance Vans	11.5%	Data Center	19.1%
Forklift Batteries	15.1%	Base Model Sedans	18.1%
BDS Graphics - Spring	16.2%	Outlet Modernization Part I - POS Hardware	37.3%
Waste Hauling	26.5%	Lighting Services	39.9%
General Contractor - New Store 605	4.7%	Pest Control	11.6%
Shopping Carts - Outlet & BDS	19.6%	Locksmith Services	0.8%
Zebra Wireless Printers - BDS	10.2%	Store Lawn and Snow	7.5%
Outlet Vertical Wall Fixture	40.3%	Corporate Housekeeping	28.6%
Store Local & Long Distance Service	29.4%	Wood Fixtures (Millwork)	22.3%
Corp Center Local, Long Distance and Data Service	48.8%	Shopping Bags	11.0%
17" Top Hangers	26.4%	Metal Fixtures (Gondola)	8.0%
Restroom Supplies (tissue, hand towels, soap, etc)	22.1%	Metal Accessories (Wire)	39.4%
Corrugated Boxes (DC tote, ecommerce, and file)	2.6%	Armored Car Service	24.1%
Energy (Texas)	15.7%	Intermodal Transport	9.0%
12" Bottom Hangers	17.9%	CCTV Program	28.2%
POS Supplies (register rolls, ribbons)	12.5%	Hand Held Mobile Printers	30.7%
Apparel Boxes - BDS	4.9%	Jewelry Boxes	10.8%
DSL (350 Outlet Stores)	29.0%	Currior Services	20.0%
Outlet Fixtures	39.1%	Social Media	40.0%
Vehicle Purchases (7 field positions - FY10 4th Qtr)	13.9%	Remodels	16.8%

# Opportunities & Savings Areas

The list below outlines the average percentage savings for E-RA spend categories

Area	Savings %	Area	Savings %
Temporary Staff	64	Batteries	29
Travel Management	63	Freight	29
Pest Control	59	Office Furniture	27
Bottled Water	58	Cleaning Services	25
Stationery	58	Statements and Letters	24
Furniture	52	IT Hardware	23
Modems	49	Scanners	23
Laser Printers	48	Electricity	22
Brochures	41	Vending Machines	22
Telecoms (Mobile)	40	Capital Equipment	19
Telecoms (Fixed)	38	Fleet Management	18
Paper	36	Utilities	17
Telecommunications	35	Security	15
Lights	34	Recycling	14
Mobile telephony	34	Water	14
Office Supplies	33	Car Rental	13
Print	33	Electrical cabling and install	13
Hotel accommodation	32	Gas	13
IT Equipment	32	Packing Services	13
Waste Disposal	32	Bulk Envelopes	12
Laptops and PCs	31	Mail and distribution	12
Airfreight	30	Fleet – leased cars	10
Media Supplies	30	Catering Services	8

# Contact Information



**Electronic Auction Services, Inc (EASi)**  
77 Milford Rd  
Suite 217  
Hudson, Ohio 44236  
[www.eauctionservices.com](http://www.eauctionservices.com)

## Abbey Riley

330 703 9759 direct

330 676 9807fax

[ariley@eauctionservices.com](mailto:ariley@eauctionservices.com)

## Ben Koberna

330 931 4685 office

330 676 9807fax

330 328 0374 direct

[ben@eauctionservices.com](mailto:ben@eauctionservices.com)

# Leaders discuss sharing services

**John Arthur Hutchison**  
jhutchison@News-Herald.com

As state officials continue to hammer out Ohio's two-year budget that is likely to contain millions in cuts to local governments and school districts, local leaders are trying to find ways to cope with the potentially reduced revenue.

About 40 superintendents, school officials, city, township, state Representatives and other state officials met Friday for two hours at the Lake County Educational Center in Painesville Township to discuss possible ways to streamline operations.

See Sharing, Page A4

## At the meeting

Hear more about the sharing of services from the president of the Ohio Controlling Board.  
[www.News-Herald.com](http://www.News-Herald.com)



## Sharing

From Page A1

During this time of economic struggle and public demand for greater fiscal transparency, officials must utilize the taxpayer dollars in the wisest, most cost effective manner, said Brian Bontempo prior to the meeting.

He is superintendent of the Lake County Educational Service Center.

Discussions of shared services included topics such as human resources, IT, and purchasing, officials said, adding these changes may occur when government entities work together to provide better services or to drive down costs.

Randy Cole, Ohio Controlling Board's president and policy adviser, said the reason he attended the meeting is because the state is trying to fill an \$8 billion budget hole.

Cole said Educational Services Centers will play an important role to help communities collaborate to share services.

"This is not a one-size-fits-all, we believe there should be choice and multiple options," Cole said.

"We believe over the next decade the best programs and most efficient programs will rise to the top."

Brief presentations were made by Ron Glisk and Rob Miller of Pennsburg, Pa.-based GCA Services Group that discussed ways to help public entities save dollars on custodial, facilities operations and maintenance and grounds management.

Mark Frye and Earl Reid of Toledo-based Palmer Conservation Consulting discussed how communities and school districts could pool together to save on energy costs.

Before the meeting concluded, state Rep. Lorraine M. Fende, D-Willowick, told the audience that she was

disappointed the format did not allow her to ask questions to Cole before he left the meeting.

She wanted to know why Gov. John Kasich's administration and Cole said there is an \$8 billion budget gap when the governor submitted a \$55 billion budget to the Ohio General Assembly after former Gov. Ted Strickland's budget that remains in effect until July was \$50 billion.

She argued that if there is an \$8 billion hole, the budget should have been submitted at about \$42 billion.

"People are told we're going to have to be taking a cut in the money we're receiving from the state," Fende said.

"This is a \$13 billion difference than what you're being told."

Fende also wondered if state budget cuts and streamlining of allocated dollars will mean consolidated school districts.

"Is shared services going to be a precursor to combine school districts?" Fende said.

After the meeting, state Rep. Ron Young, R-Leroy Township, said he was encouraged with the discussions because he believes there are a lot of people who want to see something that works to help their professions whether it is local governments or school districts.

"I think we've moved from the realm of theory to actually considering viable options that are workable in the short term," Young said.

He said that if a working model and plan is developed where workable savings can be demonstrated then he believes there could be real savings in Lake and Geauga counties.

Bontempo said the group will meet again in three to four weeks, put committees together and take some of the shared ideas presented to look at the details of how they might be accomplished.

Lake County Educational Center  
Shared Services Meeting  
May 27, 2011  
Lake County  
9:30 a.m. to 11:30 a.m.

Agenda

I. Welcome remarks-Dr. Brian Bontempo, Superintendent Lake County ESC

II. Introductions

II. Force Field Analysis

III. Shared services programs that work:

- GCA Services-Ron Glisk, Rob Miller  
Questions
- Palmer Energy-Mark Frye, Earl Reid,  
Questions

V. Participant ideas

VI. Moving forward-next steps





ATTACHMENT 4

***Lake County Can't Wait***  
***Working Together***  
***Making the Difference***  
***A Shared Services Program that works!***  
***May 27, 2011***

*Welcome*



*Dr. Brian Bontempo, Superintendent  
Lake County Educational Service Center*

*Shared Services in Lake County*

*The Vision*

# *LCESC Model*



- ” Bring people together-start*
- ” Working together- progress*
- ” Staying together- success*

# *Leadership*



- “ Ohio needs new models of governance and delivery.*
- “ How will we measure our success?*
- “ The County wide picture.*
- “ Partnerships should include: K-12 Education, Higher Education, Government, Business and Community organizations.*

# *The Challenge*



*“ The status quo must change!*

*“ Who will lead the change process?*

*“ What leadership strategies should be in place?*

# *Introductions*



*Your name, city, school district,  
organization, company.*

*What is it about shared services  
that you found compelling  
enough to join us today.*



# *Shared Services-The Challenge*





*Respond to the sense of urgency*  
*Listen to each other*  
*Work together*  
*Celebrate success*





# *Lake County is different !*

*Most counties  
typically do  
nothing  
when faced  
with tough  
decisions!*





## *What we know...*

- " The needs of the county are and have been changing*
- " The county must assess these needs to plan for change and improvements*
- " County leaders must continue to work together*
- " County leaders must be committed to improvement*



*Never doubt that a small group of  
thoughtful committed citizens  
can change the world...*

*Indeed, it's the only thing that ever has!*

*Margaret Mead*

## *What is the risk?*



*Collaboration can not occur if we can't make small steps that lead to improvements.*

*If the expectation is a big breakthrough rather than baby steps, it is unlikely for anything to change.*

*We must have something to lose by not collaborating.*

*In Lake County*



*As we take small steps of working together trust gets built and the bigger things can happen.*

*Your willingness to meet and explore options is a major strength.*



*So today we move forward...*



# ***Force Field Analysis***

*Force Field analysis is a method for identifying, discussing, and evaluating forces that drive and restrain the change process.*

*A force field analysis can assist in developing strategies for change that are successful.*



## *Types of Forces:*

- " available resources traditions*
- " vested interests*
- " organizational structures*
- " relationships*
- " social or organizational trends*
- " attitudes of people*
- " regulations*
- " personal or group needs*
- " present or past practices*
- " institutional policies or norms, values, desires, costs, people, and events.*



## *Working together for the benefit of the residents of Lake County*

- ” List all forces driving change in the column to the left, and all forces restraining change in the column to the right.*
- ” Assign a score to each force, from 1 (weak) to 5 (strong).*
- ” Forces Driving Change /Forces Restraining Change*



# *Identifying Forces*



*Forces driving change*

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*Working  
together for the  
benefit of the  
residents of  
Lake County*



*Forces restraining change*

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# *Discussion*



*What are the forces driving change?*

*What are the forces restraining change?*

***GCA  
Services***



***Palmer  
Energy***

*Two examples of how we might move forward with a shared services program in Lake County.*

***Key question:***

***As an example, how could we work together to take advantage of the benefits of sharing services and collaborating?***



## *Participant ideas:*

*How do you think we could start a shared services program in Lake County?*

*Next Step*



*Dr. Brian Bontempo*

*Join us for a second meeting to  
move shared services in Lake  
County forward.*



***Working together,  
we will make a difference!***

Lake County Shared Services Activity May 27, 2011

**Driving Forces**

Dollars

Public sentiment

How students learn

Limited resources

Desire to provide more for community

Become more efficient

Lack of resources

Taxpayers

Community groups

To continue service delivery

Older population

Shrinking pot of money

Smaller household size

Small population growth

Technology

Revenue and reductions

Growth

Demographic changes

Resources

Economy

Financial constraints

New ways to do things

Need for efficiency

Save money

Statewide push

Lack of funding

No grants available

Taxpayers not on board

Economy of scale

Money/cost

Taxpayer/responsibility

Cutbacks of revenue

Cost of all products

Budget challenges

New political climate

Contracting budgets

Dissatisfaction with status quo

Changing world

New legal opportunities

Globalization

Less people to do more work

Less money available to all cities

Need for cooperation

Cooperative thinking

Political pressures

There is value in combining efforts

Consequences

Lack of money

Inclusion in process

Organizational need

Rising costs

Taxpayers' resistance to pay more

Demands of taxpayers for services

Cost of everything is rising

Technology improvements

Lake County Shared Services Activity May 27, 2011

**Restraining Forces**

Local control

Ego

Turf

Unions

Employees

Loss of power

People do not like change

Dollars

Regulation

Loss of power or control

Culture of organization

Not knowing all the players to work with

My community is thinking we already have the best; we do not need to work with anyone

Cultures

Individual perceptions

Attitudes

Protect turf

Citizen expectations

Limited resources

Time to collaborate

Not wanting to share toys

Not be role to agree

Separate cities want to do their own thing

Fairness to what we give to what we get

Workload

Unwillingness to change the way it is already done

Charters that govern the way a city does things

Forces resisting change

Turf battles

The assumption that free markets provide the best solutions

Access to lesser costing pieces

Attitudes that losses are not really happening

Vendors unwilling to price to make work

Tradition

Turf

Rules against collaboration

Saving your job

Loss of power

Ego

Sharing equipment

Not use to sharing

Policies and procedures  
Personal self-interest  
Fear of change  
Lack of trust  
Infrastructure to to it  
Parochial thinking  
Unwillingness  
Too many chiefs losing position  
Tradition/cultures  
Competing desires  
Personal issues  
Sacred cows  
The way we have always done things  
Time  
Distance  
Attitude  
Fear  
Territory  
Success  
Good enough  
Tribalism  
Lowest common denominator  
Past practice

Old allegiances

Past perceptions

Laws

Egos

Tradition

It is changes

Existing statutes under scrutiny (SB5)

Regulations

Lack of funding

Lack of workforce

Employee attitudes

Laws against things



382 Blackbrook Road  
Painesville, Ohio 44077  
Phone 440-350-2563  
Fax 440-350-2566

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Brian Bontempo, Ed.D., Superintendent

Attachment 7

July 14, 2011

Thank you for attending the first meeting to discuss a countywide-shared services program on May 27, 2011. My objective was to introduce and discuss how we can begin a program of shared services for Lake County. As I mentioned, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the taxpayer dollars in the wisest way. The Lake County Educational Service Center would like to play a key role in development of a cost-effective sustainable-shared services program.

At our first meeting in May we participated in a Force Field Analysis that established the driving and restraining forces that might support or become barriers to shared services programs. The next step is to work together to capitalize on the forces driving us to create a sustainable cost-effective shared services program and overcome any identified barriers that are in the way of the development of a successful program. I have attached the results of the discussion.

The Lake County Educational Service Center intends to seek funding for the development of a model for the planning, implementation and evaluation of a shared services program in accordance with Am.Sub. H.B.153.

I invite you to join with me to continue to explore and develop a shared services model in Lake County. This meeting will be held at the **Lake County Educational Service Center located at 382 Blackbrook Road on Friday September 16, 2011 at 9:30 a.m.** At this meeting, we will identify a starting point in which to begin!

Please RSVP your attendance to Becky Tressler at [rtressler@lakeesc.org](mailto:rtressler@lakeesc.org) or call (440) 350-2563, Ext. 734.

Sincerely,

A handwritten signature in black ink, appearing to read "B. Bontempo", written in a cursive style.

Dr. Brian Bontempo, Superintendent

***Lake County Can't Wait  
Working Together  
Making the Difference  
A Shared Services Program that works!***

Lake County Educational Center

September 16, 2011

9:30 a.m. to 11:30 a.m.

Agenda

- I. Welcome remarks-Dr. Brian Bontempo
- II. Introductions
- II. Force Field Analysis discussion-Dr. Ronald L. Victor
- III. Developing a starting point for Lake County-Mr. David McCarty
- IV. Participant ideas/subcommittee structure moving forward





ATTACHMENT 9

***Lake County Can't Wait***  
***Working Together***  
***Making the Difference***  
***A Shared Services Program that works!***  
***September 16, 2011***

*Welcome*



*Dr. Brian Bontempo, Superintendent  
Lake County Educational Service Center*

*Shared Services in Lake County*

*The Vision*

# *LCESC Model*



- ” Bring people together-start*
- ” Working together- progress*
- ” Staying together- success*



# *Lake County* *Educational Service Center*

# *Introductions*



## *What we know...*

- " The needs of the county are and have been changing*
- " The county must assess these needs to plan for change and improvements*
- " County leaders must continue to work together*
- " County leaders must be committed to improvement*



# *Other programs examples...*

*North Coast  
Shared Services Alliance  
Geauga County ESC*



# *Force Field Analysis*

## *Discussion*

*Forces Driving Change /Forces  
Restraining Change*

Cost Savings

Collaboration



# *David McCarty*

- " Why Are You Here*
- " Current State*
- " Desired State*
- " Process*
- " Next Steps*
- " Questions*

Sharing

Leverage



## *Why Are You Here*

- ” To achieve maximum cost savings, efficiency, and quality*
- ” Leverage suppliers and deliver hard dollar cost savings to your organization*
- ” Manage suppliers more effectively*
- ” Everyone believes their process is the best!*
- ” Accomplish this as an individual or with others?*



## *Current State*

- ” Shrinking budget and increased demands on your time*
- ” Everyone believes their process is the best*
- ” Different personalities/agenda’s*
- ” Goals & Objectives vary among county leaders*

Cost Savings

Collaboration



## *Desired State*

- " Cost Savings*
- " Ease of Managing suppliers/Contracts*
- " On going management of suppliers –SLA's*
- " Collaboration*
- " Recognition*
- " Personal Growth*

Sharing

Leverage



## *Process*

- ” Rate spend areas in terms of yearly dollar volume, supplier relationships, ability to evaluate/gather data, and ability to drive change*
- ” Evaluate areas where similar spend is taking place*
- ” Conduct spend & opportunity assessment*
- ” Apply Strategic Sourcing methods*
- ” Leverage spend as a Group- BUT have individual contracts*

Cost Savings

Collaboration



## *Next Steps*

- ” Work with sub committee on Project Outline*
- ” Meet individually to answer questions-Go/No Go*
- ” Review individual spend data*
- ” Determine ability to source spend areas*
- ” Move forward on group/individual activity*

Sharing

Leverage

Cost Savings

Collaboration



# *Questions*

*Contact Information*

*David McCarty*

*[awfinc\\_1@juno.com](mailto:awfinc_1@juno.com)*

*440-318-8479*

Sharing

Leverage



*Participant ideas*

*Subcommittee structure*

*Moving forward to  
determine the project  
starting point.*



***Working together,  
we will make a difference!***

**EDUCATIONAL SERVICE CENTER OF LAKE COUNTY  
LIMITED ADMINISTRATOR CONTRACT  
(Employed After STRS Retirement)  
SUPPLEMENTAL**

Pursuant to the provisions set forth in this contract, the Lake County Educational Service Center (hereinafter Board) and Ron Victor (Social Security No. \_\_\_\_\_) of Ron Victor (hereinafter) Administrator), do hereby agree as follows:

The Board hereby agrees to employ the Administrator for a period of 10 days from March 9, 2011 to July 31, 2011 tentative assignment in the position of Regional Purchasing Coordinator.

The number of work days during the term of this agreement shall be 10 days for the initial year.

The compensation level for this agreement shall be at a daily rate of \$358.33; billed to ESC payable consistent with the policy of the Lake County Educational Service Center.

Administrator hereby agrees to abide by all Lake County Educational Service Center policies, rules and regulations now in effect, as well as those which may be revised or newly adopted during the term of this contract. Administrator further agrees to comply with all applicable state laws and regulations and accepts the provisions of the laws pertaining to the respective Retirement System as part of this contract and a condition of this employment. Administrator further agrees to maintain a valid Ohio State Department of Education Certificate applicable to the position stated above.

It is further agreed, that the Administrator, having retired to the State Teachers Retirement System, has the option of participating in the STRS's health insurance program and therefore waives any and all right to participate in the health insurance program provided by the Lake County Educational Service Center.

It is further agreed:

1. that the administrator may not accrue additional STRS credit as a result of service following reemployment. Instead, the Board and the reemployed administrator shall make contributions to STRS that will fund a single life annuity with a reserve based on the reemployed administrator's accumulated contributions during his/her period of service as an administrator following reemployment, pursuant to ORC 3307.35,

2. the administrator is not eligible for severance pay for accumulated sick leave and may not participate in any future retirement incentive programs,

3. the administrator will be eligible to accumulate sick leave. Sick leave shall commence at zero (0) days for the administrator who will earn 1 1/4 days of sick leave per month for the duration of reemployment. The administrator may request an advance of up to five (5) days of sick leave, if necessary and must reimburse the Board for any advanced sick leave which is not earned at the time the administrator separates his/her employment with the District,

4. that to the extent that it conflicts with same, this provision expressly supersedes and replaces ORC Section 3319.141.

COPY

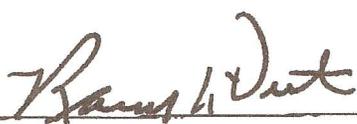
Unless earlier terminated or suspended in accordance with law and/or Governing Board policy or as set forth, this contract shall remain in force for the term set, but it is hereby mutually agreed by the parties that at any

time during the life of this contract the Administrator, at the direction of the Superintendent, may be transferred without reduction in compensation from the position set forth to a position of lesser responsibility, unless compensation is reduced by mutual agreement or otherwise in accordance with law.

It is also mutually agreed that notwithstanding ORC 3319.02, the Administrator will not be eligible to receive a multiple year contract at anytime subsequent to his/her initial reemployment with the District. Rather, the Administrator is only eligible to a one-year contract that will automatically expire at the end of the referenced school year, without further notice of non-renewal and without compliance with ORC 3319.02, including the evaluation procedures. The Administrator expressly acknowledges that this and the above-referenced provisions supersede and replace any rights that he/she might otherwise be entitled to pursuant to ORC 3319.02, and that it may differ from the rights of other administrators in the District. The Administrator further expressly acknowledges that regardless of whether he/she has already attained continuing contract status as a teach in this or any other school district, the Administrator hereby waives any rights he/she may have under law to exert any right to employment as a teacher by virtue of having attained continuing contract status as a teacher in this District by reason of employment under this agreement.

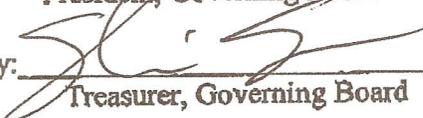
Continued employment under this contract is contingent upon state, federal, and/or local funding. Should the state, federal, and/or local funds available for the employment of the undersigned be terminated, reduced, interrupted, or otherwise made unavailable to the Lake County Educational Service Center, said Board may suspend this contract for the remainder of its term.

The undersigned Administrator hereby waives any right to continued employment in the above circumstances.

By:   
Employee

Date: 2/18/11

By:   
President, Governing Board

By:   
Treasurer, Governing Board

**EDUCATIONAL SERVICE CENTER OF LAKE COUNTY  
LIMITED ADMINISTRATOR CONTRACT  
(Employed After STRS Retirement)**

Pursuant to the provisions set forth in this contract, the Lake County Educational Service Center (hereinafter Board) and Ron Victor (Social Security No. \_\_\_\_\_) of Ron Victor (hereinafter Administrator), do hereby agree as follows:

The Board hereby agrees to employ the Administrator for a period of One (1) Year from August 1, 2011 to July 31, 2012 tentative assignment in the position of Director, P-16. The number of work days during the term of this agreement shall be up to 56 days with timesheets.

The compensation level for this agreement shall be at a daily rate of \$250.00 payable consistent with the policy of the Lake County Educational Service Center.

Administrator hereby agrees to abide by all Lake County Educational Service Center policies, rules and regulations now in effect, as well as those which may be revised or newly adopted during the term of this contract. Administrator further agrees to comply with all applicable state laws and regulations and accepts the provisions of the laws pertaining to the respective Retirement System as part of this contract and a condition of this employment. Administrator further agrees to maintain a valid Ohio State Department of Education Certificate applicable to the position stated above.

It is further agreed, that the Administrator, having retired to the State Teachers Retirement System, has the option of participating in the STRS's health insurance program and therefore waives any and all right to participate in the health insurance program provided by the Lake County Educational Service Center.

It is further agreed:

1. that the administrator may not accrue additional STRS credit as a result of service following reemployment. Instead, the Board and the reemployed administrator shall make contributions to STRS that will fund a single life annuity with a reserve based on the reemployed administrator's accumulated contributions during his/her period of service as an administrator following reemployment, pursuant to ORC 3307.35,

2. the administrator is not eligible for severance pay for accumulated sick leave and may not participate in any future retirement incentive programs,

3. the administrator will be eligible to accumulate sick leave. Sick leave shall commence at zero (0) days for the administrator who will earn 1 1/4 days of sick leave per month for the duration of reemployment. The administrator may request an advance of up to five (5) days of sick leave, if necessary and must reimburse the Board for any advanced sick leave which is not earned at the time the administrator separates his/her employment with the District,

4. that to the extent that it conflicts with same, this provision expressly supersedes and replaces ORC Section 3319.141.

Unless earlier terminated or suspended in accordance with law and/or Governing Board policy or as set forth, this contract shall remain in force for the term set, but it is hereby mutually agreed by the parties that at any time during the life of this contract the Administrator, at the direction of the Superintendent, may be

08.08.2011

COPY

transferred without reduction in compensation from the position set forth to a position of lesser responsibility, unless compensation is reduced by mutual agreement or otherwise in accordance with law.

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Continued employment under this contract is contingent upon state, federal, and/or local funding. Should the state, federal, and/or local funds available for the employment of the undersigned be terminated, reduced, interrupted, or otherwise made unavailable to the Lake County Educational Service Center, said Board may suspend this contract for the remainder of its term.

The undersigned Administrator hereby waives any right to continued employment in the above circumstances.

By: \_\_\_\_\_  
Employee

By:   
\_\_\_\_\_  
President, Governing Board

Date: \_\_\_\_\_

By:   
\_\_\_\_\_  
Treasurer, Governing Board

Subject	Location	Start	End	Re...	C...
Cabinet Meeting	LCESC	Fri 12/17/2010 1:00 PM	Fri 12/17/2010 2:30 PM		
LCESC Pat Hoyt/Brian Bontempo	Chesters	Mon 12/20/2010 12:00 PM	Mon 12/20/2010 1:30 PM		
LCESC/Ron Young/P-16 Update ...		Tue 12/21/2010 11:00 AM	Tue 12/21/2010 12:00 PM		
LCESC/MHJ Grant letter		Tue 12/21/2010 4:00 PM	Tue 12/21/2010 4:30 PM		
LCESC\Dominic\Brian	LCESC	Mon 12/27/2010 9:00 AM	Mon 12/27/2010 10:00 AM		
LCESC/Prepare for meeting with...	Office	Wed 1/5/2011 8:00 AM	Wed 1/5/2011 10:00 AM		
LCESC/GCESC Bill Hiller/Brian an...	Sunny Street Caf...	Fri 1/7/2011 8:00 AM	Fri 1/7/2011 9:30 AM		
LCESC/Brian Bontempo	LCESC	Mon 1/10/2011 9:00 AM	Mon 1/10/2011 10:00 AM		
LCESC\Fairport BOE mtg	Fairport HS	Mon 1/10/2011 7:00 PM	Mon 1/10/2011 8:00 PM		
Cabinet Meeting	LCESC	Tue 1/18/2011 10:00 AM	Tue 1/18/2011 12:00 PM		
LCESC Becky Tressler		Thu 1/20/2011 9:00 AM	Thu 1/20/2011 11:00 AM		
LCESC Becky	Quail Hollow\all ...	Fri 1/21/2011 1:45 PM	Fri 1/21/2011 2:00 PM		
LCESC\Website training	LCESC	Wed 1/26/2011 8:30 AM	Wed 1/26/2011 11:30 AM		
LCESC/Jana Holwick	Lake Erie Cafete...	Thu 1/27/2011 12:00 PM	Thu 1/27/2011 1:30 PM		
LCESC Governing Board mtg.	Auburn Career C...	Tue 2/1/2011 5:45 PM	Tue 2/1/2011 7:30 PM		
LCESC Website training		Wed 2/2/2011 2:00 PM	Wed 2/2/2011 3:00 PM		
LCESC Brian Bontempo/Dione D...		Thu 2/3/2011 10:30 AM	Thu 2/3/2011 11:30 AM		
LCESC superintendent mtg.		Thu 2/10/2011 8:30 AM	Thu 2/10/2011 9:00 AM		
Conference call/Sean McKinnis/...	LCESC	Mon 2/14/2011 11:30 AM	Mon 2/14/2011 12:00 PM		
LCESC/Dione/14.4/	Lakeland	Mon 2/14/2011 3:00 PM	Mon 2/14/2011 3:30 PM		
LCESC Dione	Lakeland	Mon 2/14/2011 3:00 PM	Mon 2/14/2011 4:00 PM		
JBHM/LCESC/ Linda Williams/58...	Lunch	Tue 2/15/2011 11:30 AM	Tue 2/15/2011 12:30 PM		
LC EWA Planning Council	LCESC	Fri 2/18/2011 8:30 AM	Fri 2/18/2011 10:00 AM		
LCESC/GCESC Conference call/P...	719-387-8317 ...	Fri 2/18/2011 2:00 PM	Fri 2/18/2011 3:00 PM		
LCESC-prepare OSBA nomination		Tue 3/1/2011 2:00 PM	Tue 3/1/2011 3:00 PM		
LCESC/Superintendent' meeting/...		Thu 3/10/2011 8:30 AM	Thu 3/10/2011 10:45 AM		
LCESC/Brian Bontempo	conference call	Mon 3/14/2011 2:30 PM	Mon 3/14/2011 3:00 PM		
LCESC video Brian		Fri 3/18/2011 9:30 AM	Fri 3/18/2011 10:30 AM		
LCESC/Lake County Developme...	Dino's	Fri 3/18/2011 12:00 PM	Fri 3/18/2011 1:30 PM		
LCESC-prepare video for produc...		Sat 3/19/2011 6:00 PM	Sat 3/19/2011 8:00 PM		
Budget Briefing	LCESC	Mon 3/21/2011 8:00 AM	Mon 3/21/2011 10:00 AM		
LCESC/Yvonne/Ann Fairhurst/Su...	LCESC	Wed 3/23/2011 1:00 PM	Wed 3/23/2011 2:00 PM		
LCESC/edit video		Sun 3/27/2011 12:00 PM	Sun 3/27/2011 4:00 PM		
LCESC HS P-16 Principals mtg		Mon 3/28/2011 11:00 AM	Mon 3/28/2011 12:30 PM		
LCESC GCESC prepare letter of i...		Wed 3/30/2011 7:00 PM	Wed 3/30/2011 9:00 PM		
LCESC prepare EWA document ...		Thu 3/31/2011 9:00 PM	Thu 3/31/2011 11:00 PM		
LCESC Earl Reid Plamer Energy	TBD	Tue 4/5/2011 4:30 PM	Tue 4/5/2011 5:00 PM		
LCESC Governing Board mtg./36...	Auburn Career C...	Tue 4/5/2011 5:45 PM	Tue 4/5/2011 7:30 PM		
LCESC/GCESC prepare and sub...		Wed 4/6/2011 9:00 AM	Wed 4/6/2011 10:00 AM		
LCESC/GCESC prepare revisions ...		Fri 4/8/2011 8:00 AM	Fri 4/8/2011 10:00 AM		
LCESC P-16 sub-committee mee...	Lakeland	Mon 4/11/2011 8:00 AM	Mon 4/11/2011 8:30 AM		
LCESC All Board Dinner/17.9/	Quail Hollow Vis...	Mon 4/11/2011 9:00 AM	Mon 4/11/2011 9:30 AM		
LCESC review and revise drafts		Tue 4/12/2011 9:00 AM	Tue 4/12/2011 10:00 AM		
LCESC Lakeland/9.5/		Wed 4/13/2011 10:00 AM	Wed 4/13/2011 11:00 AM		
LCESC Lakeland/5.6/		Wed 4/13/2011 2:45 PM	Wed 4/13/2011 3:00 PM		
LCESC/All Boards Dinner	Quail Hallow	Thu 4/14/2011 5:30 PM	Thu 4/14/2011 8:30 PM		
LCESC Yvonne Delgado/18.7/	Great Lakes Scie...	Mon 4/18/2011 8:45 AM	Mon 4/18/2011 11:45 AM		
LCESC Medina Co. Sub meeting		Tue 4/19/2011 11:00 AM	Tue 4/19/2011 12:00 PM		
LCESC Earl Reid	Bob Evans	Tue 4/19/2011 12:30 PM	Tue 4/19/2011 1:30 PM		
GCA LCESC Rob Miller	Bob Evans	Wed 4/20/2011 12:30 PM	Wed 4/20/2011 2:30 PM		

Subject	Location	Start	End	Re...	C...
LCESC Brian/Sherri/Substitute pr...	LCESC	Thu 4/21/2011 10:00 AM	Thu 4/21/2011 11:00 AM		
LCESC Becky		Tue 5/10/2011 8:30 AM	Tue 5/10/2011 9:30 AM		
LCESC Prepare agendas and P-1...	LI office	Wed 5/11/2011 8:00 AM	Wed 5/11/2011 12:30 PM		
LCESC Superintendent's meeting	LCESC	Thu 5/12/2011 8:30 AM	Thu 5/12/2011 10:00 AM		
LCESC / Earl Reid	Bob Evans	Thu 5/12/2011 11:00 AM	Thu 5/12/2011 12:30 PM		
LCESC John Vitale/38.9/	Corporate College	Thu 5/12/2011 3:00 PM	Thu 5/12/2011 4:00 PM		
LCESC /Brian/GCA/Palmer		Tue 5/17/2011 9:30 AM	Tue 5/17/2011 11:30 AM		
LCESC Ron Young breakfast me...	TBD	Thu 5/19/2011 7:30 AM	Thu 5/19/2011 8:30 AM		
LCESC GCESC Ann Fairhurst CF	C F /4.9/	Thu 5/19/2011 10:00 AM	Thu 5/19/2011 10:15 AM		
LCESC Brian/Paul P 16 principals...	LCESC	Thu 5/19/2011 10:30 AM	Thu 5/19/2011 11:00 AM		
LCESC Ron Young	Bob Evans	Fri 5/20/2011 7:15 AM	Fri 5/20/2011 8:15 AM		
LCESC Design Team meeting	Lakeland	Fri 5/20/2011 8:30 AM	Fri 5/20/2011 9:30 AM		
LCESC Ernie Brass	Dino's	Fri 5/20/2011 2:00 PM	Fri 5/20/2011 3:00 PM		
LCESC Ron Glisk Rob Miller	Conference Call	Mon 5/23/2011 12:00 PM	Mon 5/23/2011 12:30 PM		
LCESC draft sub-calling e-mail		Tue 5/24/2011 10:00 AM	Tue 5/24/2011 10:30 AM		
LCESC Cathy Zeller'p-16	Lake County Uni...	Thu 5/26/2011 8:30 AM	Thu 5/26/2011 9:30 AM		
LCESC Brian/shared services me...	LCESC	Thu 5/26/2011 9:30 AM	Thu 5/26/2011 10:00 AM		
LCESC Brian		Thu 5/26/2011 9:30 AM	Thu 5/26/2011 10:00 AM		
LCESC Max Blachman	WVIZ	Thu 5/26/2011 3:00 PM	Thu 5/26/2011 4:00 PM		
LCESC shared services meeting	LCESC	Fri 5/27/2011 9:30 AM	Fri 5/27/2011 12:30 PM		
LCESC Mike Bloom	Bob Evans	Fri 5/27/2011 2:00 PM	Fri 5/27/2011 3:00 PM		
LCESC-Planning Council meeting	LCESC	Fri 6/3/2011 8:30 AM	Fri 6/3/2011 10:00 AM		
LCESC picnic	Fairport Beach P...	Fri 6/3/2011 11:30 AM	Fri 6/3/2011 1:00 PM		
LCESC Sub-Committe Maggie, ...	Auburn Career C...	Mon 6/6/2011 1:00 PM	Mon 6/6/2011 2:30 PM		
LCESC sub calling mtg Brian/She...		Mon 6/13/2011 8:00 AM	Mon 6/13/2011 9:00 AM		
LCESC P-16 Principals meeting	LCESC	Mon 6/13/2011 8:30 AM	Mon 6/13/2011 9:00 AM		
Jane Ellen Battles MHJ Foundati...	LCESC	Mon 6/13/2011 9:00 AM	Mon 6/13/2011 10:00 AM		
LCESC goals mtg		Mon 6/13/2011 11:30 AM	Mon 6/13/2011 12:30 PM		
LCESC Lake Co. Exchange	Helregal's Inn	Mon 6/13/2011 12:00 PM	Mon 6/13/2011 1:00 PM		
LCESC ride with Brian to Bricco		Mon 6/20/2011 11:15 AM	Mon 6/20/2011 1:30 PM		
LCESC John Bagela Director of C...	Bricco	Tue 6/21/2011 12:00 PM	Tue 6/21/2011 1:30 PM		
LCESC sub-calling project meeti...	LCESC	Wed 6/22/2011 10:00 AM	Wed 6/22/2011 12:00 PM		
P-16 strategic imperative 2 sub-...	LCESC Merrie Da...	Thu 6/23/2011 11:00 AM	Thu 6/23/2011 12:00 PM		
LCESC Michael Bloom/25.5/	Chester Tavern	Fri 6/24/2011 1:00 PM	Fri 6/24/2011 2:00 PM		
LCESC Brian,Sherri Sub-calling ...	LCESC	Wed 6/29/2011 8:30 AM	Wed 6/29/2011 9:00 AM		
LCEWA SI 2 Sub committee	LCESC	Wed 6/29/2011 9:00 AM	Wed 6/29/2011 10:30 AM		
LCESC Brian / Keith sub calling	LCESC	Wed 7/6/2011 3:00 PM	Wed 7/6/2011 4:00 PM		
LCESC Michael Bloom/39.9/	TBD	Thu 7/7/2011 8:00 AM	Thu 7/7/2011 8:30 AM		
LCESC Brian/P-16	LCESC	Mon 7/11/2011 1:30 PM	Mon 7/11/2011 2:30 PM		
LCESC Brian	LCESC	Tue 7/12/2011 11:00 AM	Tue 7/12/2011 12:00 PM		
LCESC John Begala/Emily Campell	Bricco	Wed 7/13/2011 12:00 PM	Wed 7/13/2011 1:30 PM		
LCESC Ted Roseberry/23.9/	98 West Prospect	Fri 7/22/2011 12:45 PM	Fri 7/22/2011 1:45 PM		
LCESC prepare mailer item for P...		Mon 7/25/2011 9:30 AM	Mon 7/25/2011 10:30 AM		
LCESC Shared Services Letter an...		Mon 7/25/2011 11:00 AM	Mon 7/25/2011 11:30 AM		
LCESC prepare BOE notes		Wed 7/27/2011 2:00 PM	Wed 7/27/2011 4:00 PM		
LCESC P-16 Sub-committee me...	Crossroads Early ...	Tue 8/2/2011 9:00 AM	Tue 8/2/2011 10:00 AM		
LCESC		Tue 8/2/2011 10:00 AM	Tue 8/2/2011 11:30 AM		
LCESC Governing Board mtg./21...		Tue 8/2/2011 5:00 PM	Tue 8/2/2011 7:30 PM		
LCESC Draft Board note Painesvi...		Tue 8/2/2011 8:45 PM	Tue 8/2/2011 9:45 PM		
LCESC John Weiss award meeting	LCESC	Wed 8/3/2011 8:30 AM	Wed 8/3/2011 10:00 AM		

Subject	Location	Start	End	Re...	C...
LCESC P-16 Sub-committee 3	Lakeland CLI 2n...	Wed 8/3/2011 1:00 PM	Wed 8/3/2011 2:30 PM		
LCESC P-16 Sub-committee 1	Lakeland	Wed 8/3/2011 2:30 PM	Wed 8/3/2011 4:00 PM		
LCESC GCESC prepare CF Grant		Tue 8/9/2011 9:00 AM	Tue 8/9/2011 12:00 PM		
LCESC / JBHM Leadership Confe...	Heritage Middle	Thu 8/11/2011 8:00 AM	Thu 8/11/2011 3:00 PM		
LCESC GCESC grant preparation		Fri 8/12/2011 8:00 AM	Fri 8/12/2011 11:00 AM		
LCESC prepare e-mail and draft ...		Sun 8/14/2011 8:00 PM	Sun 8/14/2011 9:00 PM		
LCESC Emily Campell	Bricco	Tue 8/16/2011 12:00 PM	Tue 8/16/2011 1:30 PM		
LCESC prepare agenda and e mail		Tue 8/16/2011 9:30 PM	Tue 8/16/2011 10:00 PM		
LCESC prepare Lake Co. Econom...		Thu 8/18/2011 10:00 AM	Thu 8/18/2011 11:00 AM		
LCESC Design Team meeting/13...	Lakeland Colleg...	Fri 8/26/2011 1:00 PM	Fri 8/26/2011 3:00 PM		
LCESC	Office	Mon 8/29/2011 10:30 AM	Mon 8/29/2011 1:00 PM		
LCESC Riverside Payment in Lieu...	Riverside BOE	Tue 8/30/2011 11:00 AM	Tue 8/30/2011 1:00 PM		
LCESC prepare payment in lieu ...		Wed 8/31/2011 7:00 AM	Wed 8/31/2011 9:00 AM		
LCESC prepare CF grant		Sat 9/3/2011 12:00 PM	Sat 9/3/2011 3:00 PM		
LCESC Keith / Brian	LCESC	Wed 9/7/2011 8:00 AM	Wed 9/7/2011 10:30 AM		
LCESC Keith and Brian	LCESC	Wed 9/7/2011 8:15 AM	Wed 9/7/2011 9:15 AM		
LCESC prepare pp for LC EDC		Thu 9/8/2011 8:00 PM	Fri 9/9/2011 12:00 AM		
LCESC-LC Economic Developme...	Dino's	Fri 9/9/2011 12:00 PM	Fri 9/9/2011 2:00 PM		
LC Keith Miller shared services ...	LCESC	Wed 9/14/2011 8:30 AM	Wed 9/14/2011 10:30 AM		
LCESC Shared Services meeting	Lake ESC	Fri 9/16/2011 8:00 AM	Fri 9/16/2011 12:00 PM		
LC Cathy Zellar	LCESC	Thu 9/22/2011 12:00 PM	Thu 9/22/2011 1:00 PM		
LC Shared Services meeting	LCESC	Thu 9/22/2011 1:00 PM	Thu 9/22/2011 3:30 PM		
LCESC David McCarty	Bob Evans	Fri 9/30/2011 12:30 PM	Fri 9/30/2011 2:00 PM		
LC Brian	LCESC	Fri 10/14/2011 8:00 AM	Fri 10/14/2011 9:00 AM		
LC ESC Energy Seminar	LCESC	Tue 10/18/2011 9:00 AM	Tue 10/18/2011 11:00 AM		
LCESC Lake County Economic D...	LaMalfa	Wed 10/19/2011 7:30 AM	Wed 10/19/2011 9:30 AM		
LCESC prepare e mail		Thu 10/20/2011 1:00 PM	Thu 10/20/2011 2:00 PM		
LC ESC Brian Bontempo (tentativ...	LCESC	Mon 10/31/2011 1:30 PM	Mon 10/31/2011 2:00 PM		
LC EWA Planning Council	LCESC	Tue 11/1/2011 8:30 AM	Tue 11/1/2011 10:00 AM		
LCESC Governing Board mtg.	Auburn Career C...	Wed 11/2/2011 5:45 PM	Wed 11/2/2011 7:30 PM		
LCESC prepare PP		Fri 11/11/2011 2:00 AM	Fri 11/11/2011 4:30 AM		
OSBA Presentaiton/LCESC/Brian...	Columbus Conv...	Tue 11/15/2011 9:00 AM	Tue 11/15/2011 10:15 AM		
LCESC Brian Bontempo		Tue 11/22/2011 11:00 AM	Tue 11/22/2011 12:00 PM		
LCESC Dione	Lakeland/12.2/	Mon 11/28/2011 8:30 AM	Mon 11/28/2011 10:00 AM		
LCESC P-16 meeting/5.6/	Lakeland HUC	Thu 12/1/2011 8:30 AM	Thu 12/1/2011 10:00 AM		
LCESC Brian - Becky -shared ser...	LCESC	Thu 12/1/2011 11:00 AM	Thu 12/1/2011 12:00 PM		
LCESC prepare timeline		Mon 12/5/2011 10:00 AM	Mon 12/5/2011 11:00 AM		
LCESC Brian Bontempo/Bill Ker...	Bob Evans	Tue 12/6/2011 8:00 AM	Tue 12/6/2011 9:30 AM		
LCESC Bob Sommers	Perry HS	Thu 12/8/2011 10:30 AM	Thu 12/8/2011 12:30 PM		
LCESC Cathy Zellar	LCESC	Mon 12/12/2011 9:00 AM	Mon 12/12/2011 10:00 AM		
LCESC Bill Kermavner/30.2/	LCESC	Mon 12/12/2011 10:00 AM	Mon 12/12/2011 12:00 PM		
LCESC prepare Design Team Ag...		Mon 12/12/2011 1:00 PM	Mon 12/12/2011 2:00 PM		
LCESC Design Team/24.7/	LCESC	Wed 12/14/2011 9:00 AM	Wed 12/14/2011 10:30 AM		
LCESC P-16 website meeting/17....		Thu 12/15/2011 1:00 PM	Thu 12/15/2011 2:00 PM		
LCESC Luncheon		Fri 12/16/2011 1:00 PM	Fri 12/16/2011 2:30 PM		
LCESC		Tue 1/3/2012 9:00 AM	Tue 1/3/2012 11:30 AM		
Lake County Shared Services De...	LCESC	Thu 1/5/2012 9:30 AM	Thu 1/5/2012 11:00 AM		
LCESC prepare shared services d...		Sun 1/8/2012 4:00 PM	Sun 1/8/2012 8:00 PM		
LCESC P16 Shared Services/30.1/	LCESC	Mon 1/9/2012 10:00 AM	Mon 1/9/2012 11:00 AM		
LCESC Shared Services David Mc...	Bob Evans	Mon 1/9/2012 2:00 PM	Mon 1/9/2012 3:00 PM		

Subject	Location	Start	End	Re...	C...
LCESC Prepare BOE PP and docu...		Tue 1/10/2012 11:00 AM	Tue 1/10/2012 2:30 PM		
LCESC Review P16 budget/25.8/	LCESC	Wed 1/11/2012 2:00 PM	Wed 1/11/2012 3:00 PM		
LCESC Superintendent's meetin...	LCESC	Thu 1/12/2012 8:30 AM	Thu 1/12/2012 11:30 AM		
LCESC Brian Bontempo/33.7/	Yours Truly Chag...	Mon 1/16/2012 9:00 AM	Mon 1/16/2012 10:30 AM		
LCESC Ben Koberna	TBD	Mon 1/16/2012 11:00 AM	Mon 1/16/2012 1:00 PM		
LCESC Ben Koberna reverse auct...	Conference call	Tue 1/17/2012 9:30 AM	Tue 1/17/2012 10:30 AM		
LCESC Ernie Brass	Lakeland. T 218	Tue 1/17/2012 11:45 AM	Tue 1/17/2012 12:00 PM		
LCESC/GCESC Shared Services ...	Tri C Corporate ...	Tue 1/17/2012 1:00 PM	Tue 1/17/2012 3:00 PM		
LC EWA Planning Council Meeti...	LCESC	Wed 1/18/2012 12:00 PM	Wed 1/18/2012 1:30 PM		
LCESC Conference Call P-16 Stri...		Thu 1/19/2012 8:30 AM	Thu 1/19/2012 11:00 AM		
LCESC Shared Services prepare ...		Thu 1/19/2012 1:00 PM	Thu 1/19/2012 4:30 PM		
LCESC Shared services/23.6/	LCESC	Mon 1/23/2012 10:30 AM	Mon 1/23/2012 12:00 PM		
LCESC shard services survey mo...		Tue 1/24/2012 1:00 PM	Tue 1/24/2012 2:00 PM		
LCESC prepare EWA notice		Tue 1/24/2012 7:00 PM	Tue 1/24/2012 8:00 PM		
LCESC Jennifer/Mike/40.8/	Pville City BOE	Wed 1/25/2012 9:30 AM	Wed 1/25/2012 10:30 AM		
LCESC Shared Service Design Te...	Brian's office	Thu 1/26/2012 9:30 AM	Thu 1/26/2012 11:00 AM		
LCESC Sourcing Office meeting	Crowne Plaza H...	Fri 1/27/2012 11:00 AM	Fri 1/27/2012 1:30 PM		
LCESC Shared Services	LCESC	Tue 1/31/2012 9:30 AM	Tue 1/31/2012 11:00 AM		
LCESC EWA -review document a...		Thu 2/2/2012 2:00 PM	Thu 2/2/2012 3:00 PM		
LCESC BB-Ben Koberna	Conference call	Thu 2/2/2012 4:00 PM	Thu 2/2/2012 5:00 PM		
LCESC Shared Services Technolo...	LCESC	Mon 2/6/2012 9:30 AM	Mon 2/6/2012 11:00 AM		
LCESC All Boards Dinner Steve a...	LCESC	Mon 2/6/2012 10:30 AM	Mon 2/6/2012 11:30 AM		
LCESC prepare shared services PP		Mon 2/6/2012 9:00 PM	Mon 2/6/2012 10:00 PM		
LCESC Brian / Ben	ACC/29.8/	Tue 2/7/2012 4:30 PM	Tue 2/7/2012 5:30 PM		
LCESC Supt. Mtg.	LCESC	Thu 2/9/2012 8:30 AM	Thu 2/9/2012 9:30 AM		
LCESC Shared Services/13.8/	LCESC	Mon 2/13/2012 9:30 AM	Mon 2/13/2012 11:00 AM		
LCESC Dione DeMitro/NEORIO/...	LCC	Wed 2/15/2012 9:00 AM	Wed 2/15/2012 10:00 AM		
LCESC meeting to discuss All Bo...	LCESC/17.2/	Thu 2/16/2012 9:00 AM	Thu 2/16/2012 10:00 AM		
LCESC Efficient Government	Richfield Town H...	Thu 2/16/2012 9:00 AM	Thu 2/16/2012 11:30 AM		
LCESC Draft Shared Services W...		Thu 2/16/2012 6:00 PM	Thu 2/16/2012 7:00 PM		
LCESC draft letter and bid docu...		Sat 2/18/2012 11:00 AM	Sat 2/18/2012 12:30 PM		
LCESC prepare grant		Sun 2/19/2012 9:00 AM	Sun 2/19/2012 3:00 PM		
LCESC prepare grant		Mon 2/20/2012 9:00 AM	Mon 2/20/2012 11:30 AM		
LCESC prepare grant		Mon 2/20/2012 2:00 PM	Mon 2/20/2012 4:30 PM		
LCESC prepare grant		Tue 2/21/2012 8:00 AM	Tue 2/21/2012 9:30 AM		
LCESC review grant Brian	LCESC	Tue 2/21/2012 11:30 AM	Tue 2/21/2012 12:30 PM		
LCESC Drop off grant/24.5/		Wed 2/22/2012 8:30 AM	Wed 2/22/2012 9:30 AM		
LCESC meeting to discuss All Bo...	LCESC	Thu 2/23/2012 9:00 AM	Thu 2/23/2012 10:00 AM		
LCESC prepare and revise LGIF g...		Thu 2/23/2012 11:00 AM	Thu 2/23/2012 3:30 PM		
LCESC David MaCarty	Bob Evan's	Fri 2/24/2012 7:30 AM	Fri 2/24/2012 8:30 AM		
LCESC Luncheon		Fri 2/24/2012 11:30 AM	Fri 2/24/2012 12:30 PM		
LCESC Ben Koberna	TBD	Mon 2/27/2012 10:00 AM	Mon 2/27/2012 11:00 AM		
LCESC SS Mayor's presentation	Dino's	Mon 2/27/2012 12:00 PM	Mon 2/27/2012 1:00 PM		
LCESC Becky	LCESC	Mon 2/27/2012 2:00 PM	Mon 2/27/2012 3:00 PM		
LCESC EWA Executive Committe...	LCESC Board Ro...	Wed 2/29/2012 9:00 AM	Wed 2/29/2012 11:00 AM		
LCESC Lake Erie College Present...	Lake Erie College	Wed 2/29/2012 1:00 PM	Wed 2/29/2012 2:00 PM		
LCESC Painesville Exchange Club...	Hellreigel's	Mon 3/5/2012 11:30 AM	Mon 3/5/2012 1:00 PM		
LCESC Lake County Economic D...	Dino's	Fri 3/9/2012 12:00 PM	Fri 3/9/2012 1:30 PM		
LCESC Breakfast		Fri 4/20/2012 8:30 AM	Fri 4/20/2012 9:00 AM		
LCESC Picnic		Fri 6/15/2012 11:30 AM	Fri 6/15/2012 12:00 PM		

Lake County Educational Service Center  
Shared Services Regional Cooperative

**Collaborative Partners-Collaborating Entity**

Leadership Ideas  
67 Gullybrook Ln.  
Willoughby, Ohio 44094  
440.622.4971 (P)  
440.527.8018 (F)  
[www.leadershipideas.com](http://www.leadershipideas.com)]

Electronic Auction Services, Inc (EASI)  
1737 Georgetown Rd. Suite G  
Hudson, Ohio 44236  
330.931.4685 (P)  
330.676.9807 (F)  
[www.eauctionservices.com](http://www.eauctionservices.com)

Organizational Effectiveness Strategies (O.E. Strategies)  
9200 S. Hills Blvd. Ste. 140  
Broadview Hts., Ohio 44147  
866.363.4637 (P)  
[www.oestrategies.com](http://www.oestrategies.com)

## Lake County Educational Service Center

### Shared Services Regional Cooperative

#### Collaborative Partners-Collaborative Partner Contacts

Leadership Ideas  
67 Gullybrook Ln.  
Willoughby, Ohio 44094  
440.622.4971 (P)  
440.527.8018 (F)  
[www.leadershipideas.com](http://www.leadershipideas.com)  
Ronald L. Victor Ed.D.  
President  
440.622.4971  
rvictor@leadershipideas.com

Electronic Auction Services, Inc (EASI)  
1737 Georgetown Rd. Suite G  
Hudson, Ohio 44236  
330.931.4685 (P)  
330.676.9807 (F)  
[www.eauctionservices.com](http://www.eauctionservices.com)  
Ben Koberna  
Vice President of Sales  
330.328.0374  
[ben@eauctionservices.com](mailto:ben@eauctionservices.com)

Organizational Effectiveness Strategies (O.E. Strategies)  
9200 S. Hills Blvd. Ste. 140  
Broadview Hts., Ohio 44147  
866.363.4637 (P)  
[www.oestrategies.com](http://www.oestrategies.com)  
Suzanne Miklos, Ph.D.  
President  
440.546.0008 (P)  
smiklos@oestrategies.com

**Lake County Educational Service Center**

**Shared Services Regional Cooperative**

**Contact Information**-Application Contact

Lake County Educational Service Center

382 Blackbrook Rd.

Painesville, Ohio 44077

440.350.2563 (P)

440.350.2566 (F)

[www.esc-lc.org](http://www.esc-lc.org)

Ronald L. Victor, Ed. D.

Project Coordinator

440.622.4971

[rvictor@lakeesc.org](mailto:rvictor@lakeesc.org)

Lake County

**Lake County Educational Service Center**

**Shared Services Regional Cooperative**

**Contact Information**-Main Applicant

Lake County Educational Service Center

382 Blackbrook Rd.

Painesville, Ohio 44077

440.350.2563 (P)

440.350.2566 (F)

[www.esc-lc.org](http://www.esc-lc.org)

Brian Bontempo, Ed.D.

Superintendent

440.350.2563

bbontempo@lakeesc.org

Lake County

**Documentation of in-kind match source**

See Limited Administration Contract for Regional Purchasing Coordinator (Attachment 1)

See Limited Administration Contract for Director P-16/Shared Services Coordinator (Attachment 2)

Calendar with highlighted 20 days of shared services related activities of Purchasing Coordinator/Secretarial support (Attachment 3)

**Financial Documentation**

Software development and Licensing Fees: \$55,000

The deliverable at the end of twelve months is a branded portal owned by the Lake County ESC that can conduct cooperative bids through the RFP and Online pricing process. Licenses on spend management and audit software up to 50 users is included.

Program management: \$20,000

One resource will be assigned to manage the bid calendar construct the RFPs and bidding interfaces and train Lake County ESC performance throughout the year.

Change management toolkits, marketing and participation tools: \$20,000

Leadership Ideas will be assigned to coordinate the project, promote the cooperative bids and develop and execute a marketing plan that will attract participants first inside of Lake County and then throughout the State of Ohio. O.E. Strategies will the development of change management toolkits.

Web hosting, equipment, and site development and design: \$5000

Hosted secured software servers and a fully functional web-site will be created and managed as the central entry point to the shared services portal

Total grant requested \$100,000.00

Identification of each municipality, county or township served and 2010 Census

<b>AGENCY NAME</b>	<b>2010 ADM/Population</b>
Auburn Career Center	250
City of Eastlake	18,577
City of Kirtland	6,866
City of Mentor on the Lake	7,443
City of Willoughby	22,268
City of Willowick	14,171
Community Improvement Corporation	
COSE	
Fairport Harbor	3,249
Fairport Harbor Ex. Village Schools	526
Fairport Public Library	
Grand River	
Kirtland Local Schools	1,172
Kirtland Public Library	
Lake Co. Emergency Management Agency	
Lake Co. Port Authority	
Lake County Commissioner	
Lake County Commissioner	
Lake County Commissioner	
Lake County Democratic Party	
Lake County ESC	300
Lake County Planning Commission	
Lake County Republican Party	
Madison Local Schools	3,246
Madison Public Library	
Madison Village	3,145
Mentor Ex. Village Schools	8,156
Mentor Municipal Center	
Mentor Public Library	
Morley Library	
Ohio Controlling Board	
Painesville City	19,563
Painesville City Local Schools	2,979
Perry Local Schools	1,850
Perry Public Library	
Riverside Local Schools	4,877
State of Ohio	
State of Ohio	
State Representative	
State Representative	
State Senator	
Village of North Perry	979
Village of Perry	1,299
Village of Timberlake	743
Wickliffe City	13,117

Wickliffe City Schools	1,499
Wickliffe Public Library	
Willoughby Hills	8,640
Willoughby-Eastlake City Schools	8,386
Willoughby-Eastlake Public Library System	
XpenseSolutions, Energy Advisory Services	

Identification of each municipality, county or township served and 2010 Census

<b>AGENCY NAME</b>	<b>2010 ADM/Population</b>
Auburn Career Center	250
City of Eastlake	18,577
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Mentor Municipal Center	
Mentor Public Library	
Morley Library	
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Painesville City	19,563
Painesville City Local Schools	2,979
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Perry Public Library	
Riverside Local Schools	4,877
State of Ohio	
State of Ohio	
State Representative	
State Representative	
State Senator	
Village of North Perry	979
Village of Perry	1,299
Village of Timberlake	743
Wickliffe City	13,117

Wickliffe City Schools	1,499
Wickliffe Public Library	
Willoughby Hills	8,640
Willoughby-Eastlake City Schools	8,386
Willoughby-Eastlake Public Library System	
XpenseSolutions, Energy Advisory Services	



Lake County, Ohio

# Board of Commissioners

ROBERT E. AUFULDISH

RAYMOND E. SINES

DANIEL P. TROY

PAINESVILLE  
(440) 350-2745  
February 23, 2012

TOLL FREE  
(800) 899-5253

FAX  
(440) 350-2672

Dr. Brian Bontempo, Superintendent  
Lake County Educational Service Center  
Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

Dear Dr. Bontempo:

In this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the tax payer dollars in the wisest way.

There is a new role for Educational Service Centers. In meetings that have been conducted across the state, Randy Cole, Controlling Board President and Policy Advisor, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs."

It is envisioned that Regional Shared Services Centers will be created by merging the various regional service providers. The Lake County Educational Service Center has established the Lake County Shared Services Regional Cooperative.

The Lake County Board of Commissioners supports, endorses and will promote and participate in the important work of the Lake County Shared Services Regional Cooperative.

Sincerely,  
LAKE COUNTY BOARD OF COMMISSIONERS

Raymond E. Sines, President

Robert E. Aufuldish, Commissioner

Daniel P. Troy, Commissioner

S:\LCC\CLK\LTR\BCC\2012\LCESCSupport.shared.02232012.wpd

105 Main Street

P.O. Box 490

Painesville, OH 44077-0490

[www.lakecountyohio.org](http://www.lakecountyohio.org)

**Lorraine M. Fende**  
**State Representative**

---

*Committees: Health and Aging; Insurance; Ways and Means*

Lake County Educational Service Center  
Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

As State Representative for Ohio's 62<sup>nd</sup> Ohio House of Representatives District, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the tax payer dollars in the wisest way.

There is a new role for Educational Service Centers. In meetings that have been conducted across the state, Randy Cole, Controlling Board President and Policy Advisor, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs."

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I support, endorse and will promote and participate in the important work of the Lake County Shared Services Regional Cooperative.

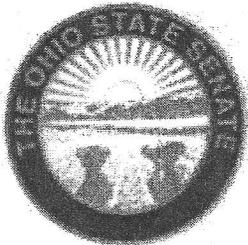
Sincerely,



State Representative Lorraine M. Fende  
Ohio House of Representatives  
62<sup>nd</sup> House District

Columbus Office:  
77 South High Street  
Columbus, Ohio 43215-6111  
Telephone: (614) 466-7251  
Fax: (614) 719-3962

District:  
Parts of Lake County  
372 E. 328<sup>th</sup> Street  
Willowick, Ohio 44095  
Telephone: (440)943-0202



**John Eklund**  
State Senator, 18<sup>th</sup> District

Senate Building  
1 Capitol Square  
Columbus, Ohio 43215  
Phone: 614.644.7718  
Fax: 614.466.7662  
SD18@senate.state.oh.us

**Committees:**

Highways and Transportation  
Judiciary  
State and Local Government and Veterans' Affairs

February 27, 2012

Lake County Educational Service Center  
Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

Gentlemen:

As State Senator representing Ohio's 18<sup>th</sup> Senate District, I recognize that these times of economic struggle warrant a re-evaluation and adjustment of governmental priorities. Our stakeholders rightly seek transparency and confirmation that government agencies are utilizing taxpayer dollars effectively and efficiently.

Educational Service Centers could play a meaningful role in achieving these goals. In meetings that have been conducted across the state, Randy Cole, Controlling Board President and Policy Advisor, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs."

It is envisioned that Regional Shared Services Centers will be created by merging various regional service providers. The Lake County Educational Service Center has established the Lake County Shared Services Regional Cooperative.

I support and endorse the Lake County ESC's efforts to explore shared service initiatives through the Lake County Shared Services Regional Cooperative, and I look forward to seeing positive results that respect local authority while enhancing efficiencies.

Sincerely,

A handwritten signature in cursive script that reads "John Eklund".

John Eklund  
18<sup>th</sup> Senate District

Lake County Educational Service Center

Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

As Mayor for the City of KIRTLAND, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the taxpayer dollars in the wisest way.

Now that the Governor's agenda is moving forward, there is a new role for Educational Service Centers. In meetings being that have been conducted across the state, Randy Cole, Controlling Board President and Policy Advisor, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs."

It is envisioned that Regional Shared Services Centers will be created by merging the various regional service providers. The Lake County Educational Service Center has established the Lake County Shared Services Regional Cooperative.

I support and endorse the important work of the Lake County Shared Services Regional Cooperative.

Sincerely,

A handwritten signature in black ink, appearing to read "M.A. Tyler". The signature is written in a cursive, flowing style.

Lake County Educational Service Center

2/27/12

Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

As Mayor for the City of Mentor-on-the-Lake, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the taxpayer dollars in the wisest way.

Now that the Governor's agenda is moving forward, there is a new role for Educational Service Centers. In meetings being that have been conducted across the state, Randy Cole, Controlling Board President and Policy Advisor, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs."

It is envisioned that Regional Shared Services Centers will be created by merging the various regional service providers. The Lake County Educational Service Center has established the Lake County Shared Services Regional Cooperative.

I support and endorse the important work of the Lake County Shared Services Regional Cooperative.

Sincerely,

A handwritten signature in black ink, appearing to be "John R. [unclear]", written over a horizontal line.

Lake County Educational Service Center

Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

As Mayor for the City of Willowick, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the taxpayer dollars in the wisest way.

Now that the Governor's agenda is moving forward, there is a new role for Educational Service Centers. In meetings being that have been conducted across the state, Randy Cole, Controlling Board President and Policy Advisor, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs."

It is envisioned that Regional Shared Services Centers will be created by merging the various regional service providers. The Lake County Educational Service Center has established the Lake County Shared Services Regional Cooperative.

I support and endorse the important work of the Lake County Shared Services Regional Cooperative.

Sincerely,

*Richard J. Bunde*

Mayor

Lake County Educational Service Center

Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

As Mayor for the <sup>Village</sup> ~~City~~ of North Perry Village, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the taxpayer dollars in the wisest way.

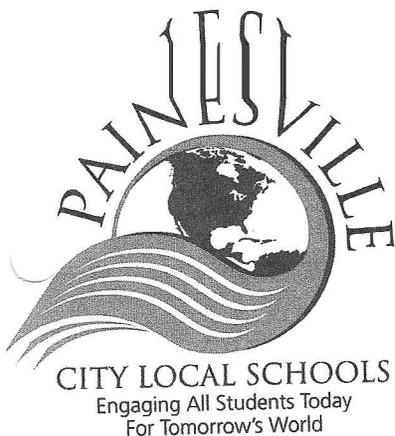
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I support and endorse the important work of the Lake County Shared Services Regional Cooperative.

Sincerely,

*C. S. Klo*  
MAYOR



58 Jefferson Street  
Painesville, Ohio 44077

Telephone: (440) 392-5060  
Fax: (440) 392-5089

[www.pcls.net](http://www.pcls.net)

BOARD OF EDUCATION

Lake County Educational Service Center  
Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

As Treasurer/C.F.O. for the Painesville City Local School District representing the Board of Education, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the tax payer dollars in the wisest way.

# *Willoughby-Eastlake Board of Education*

Stephen L. Thompson, Superintendent  
Cliff Reinhardt, Treasurer

37047 RIDGE ROAD WILLOUGHBY, OHIO 44094 (440) 946-5000  
FAX: (440) 946-4671

Margaret Warner, President  
Sharon Scott, Vice-President  
Paul Brickner  
Dan Hoffman  
Connie Newyear

February 23, 2012

Lake County Educational Service Center  
Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

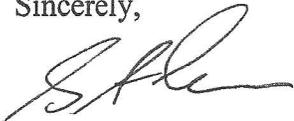
As Superintendent for Willoughby-Eastlake Schools representing the school board, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and learn how government agencies are utilizing the tax payer dollars in the wisest way.

There is a new role for Educational Service Centers. In meetings that have been conducted across the state, Randy Cole, Controlling Board President and Policy Advisor, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs."

It is envisioned that Regional Shared Services Centers will be created by merging the various regional service providers. The Lake County Educational Service Center has established the Lake County Shared Services Regional Cooperative.

The Willoughby-Eastlake Board of Education and I support, endorse and will promote and participate in the important work of the Lake County Shared Services Regional Cooperative.

Sincerely,



Stephen Thompson, Superintendent



---

**KIRTLAND LOCAL SCHOOLS**  
Kirtland • Kirtland Hills • Waite Hill • Chardon Township

---

9252 CHILLICOTHE ROAD, KIRTLAND, OHIO 44094 (440) 256-3311 Fax: (440) 256-3831

*Recognized Nationally and State-Wide for Educational Excellence*

SUPERINTENDENT OF SCHOOLS  
Mr. Steve Barrett

INTERIM TREASURER  
Mr. Stephen Vasek

BOARD OF EDUCATION  
Kat Torok, President  
Royal A. Brettrager, V. President  
Timothy Cosgrove  
Tim Kehres  
Tom Meyer

February 22, 2012

Lake County Educational Service Center  
Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

As Superintendent for the Kirtland Local Schools representing the Kirtland Board of Education, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the tax payer dollars in the wisest way.

There is a new role for Educational Service Centers. In meetings that have been conducted across the state, Randy Cole, Controlling Board President and Policy Advisor, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs."

It is envisioned that Regional Shared Services Centers will be created by merging the various regional service providers. The Lake County Educational Service Center has established the Lake County Shared Services Regional Cooperative.

The Kirtland Local Schools and I support, endorse and will promote and participate in the important work of the Lake County Shared Services Regional Cooperative.

Sincerely,

Mr. Stephen Barrett  
Superintendent



***Lake County Educational Service Center  
Shared Service Regional Cooperative  
LGIF Application  
February 29, 2012***

## Agreement Between

### Leadership Ideas and Lake County Educational Service Center

Leadership Ideas and Lake County ESC, set forth this Cross Service Provider Agreement for the provision, subject to the terms and conditions of this Agreement, of a non-exclusive, non-transferrable license to sell each other's services worldwide:

WHEREAS, Leadership Ideas has developed, produced and marketed various services for public education institutions; and

WHEREAS, Lake County ESC is an Educational Service Center providing services to public education institutions including training, organizational effectiveness and other systemic approaches for addressing public education needs; and

WHEREAS, Leadership Ideas wishes to have Lake County ESC promote its services to public education institutions; and

WHEREAS, the parties wish to explore the viability and feasibility of promoting further synergistic efforts between the two organizations,

NOW THEREFORE, in consideration of the mutual promises and covenants contained herein, the parties agree as follows:

1. Lake County ESC agrees to expend its best efforts in connection with its consulting with public education institutions to provide, where appropriate, services of Leadership Ideas.
2. The parties agree that the pricing of services of Leadership Ideas shall be as mutually agreed between Lake County ESC and Leadership Ideas but if not mutually agreed, then as determined by Leadership Ideas. The customer shall be invoiced for those services through Lake County ESC and/or in a way as is mutually acceptable to the parties if the customer directs otherwise.
3. The parties expressly agree that Leadership Ideas retains any and all property rights to its services and that if this Agreement is terminated, Lake County ESC shall not market or sell the services of Leadership Ideas.

4. The parties also expressly agree that any and all services developed and produced by Lake County ESC shall remain the property of Lake County ESC and, in the event this Agreement is terminated, Leadership Ideas agrees not to market or sell any services of Lake County ESC.
5. Each party shall be responsible for its own actions and shall indemnify and hold the other harmless for any and all claims and liabilities made against the other as a result of its wrongful acts or omissions.
6. This Agreement is in effect for one year from and after the effective date and will automatically renew for additional one year terms. The parties agree that this Agreement may be modified from time to time provided that any said modification shall be reduced in writing and signed by both parties thereto.
7. Termination. Either party may terminate this Agreement at any time with or without cause by giving 30 days written notice to the other party. In the event of termination, the balance of the Fund shall be equally divided between the two parties.

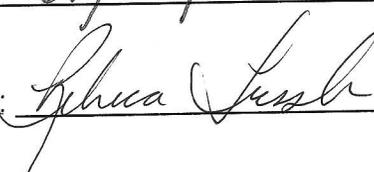
IN WITNESS WHEREOF, the parties have executed this Agreement effective \_\_\_\_\_ in the year 2012.

Leadership Ideas

by:   
 Ronald L. Victor

Title: President

Date: 2/22/12

Witness: 

Lake County ESC

by:   
 Brian Bontempo

Title: Superintendent

Date: 2/27/2012

Witness: 

## Agreement Between

### EASi. and Lake County Educational Service Center

EASi and Lake County ESC, set forth this Cross-Provider of Services Agreement for the provision, subject to the terms and conditions of this Agreement, of a non-exclusive, non-transferrable license to sell each other's services worldwide:

WHEREAS, EASi has developed, produced and marketed various services for public education institutions; and

WHEREAS, Lake County ESC is an Educational Service Center providing services to public education institutions including training, organizational effectiveness and other systemic approaches for addressing public education needs; and

WHEREAS, EASi wishes to have Lake County ESC promote its services to public education institutions; and

WHEREAS, the parties wish to explore the viability and feasibility of promoting further synergistic efforts between the two organizations,

NOW THEREFORE, in consideration of the mutual promises and covenants contained herein, the parties agree as follows:

1. Lake County ESC agrees to expend its best efforts in connection with its consulting with public education institutions to provide, where appropriate, services of EASi.
2. The parties agree that the pricing of services of EASi shall be as mutually agreed between Lake County ESC and EASi but if not mutually agreed, then as determined by EASi. The customer shall be invoiced for those services through Lake County ESC and/or in a way as is mutually acceptable to the parties if the customer directs otherwise.
3. The parties expressly agree that EASi retains any and all property rights to its services and that if this Agreement is terminated, Lake County ESC shall not market or sell the services of EASi.
4. The parties also expressly agree that any and all services developed and produced by Lake County ESC shall remain the property of Lake County

ESC and, in the event this Agreement is terminated, EASI agrees not to market or sell any services of Lake County ESC.

5. Each party shall be responsible for its own actions and shall indemnify and hold the other harmless for any and all claims and liabilities made against the other as a result of its wrongful acts or omissions.
6. This Agreement is in effect for one year from and after the effective date and will automatically renew for additional one year terms. The parties agree that this Agreement may be modified from time to time provided that any said modification shall be reduced in writing and signed by both parties thereto.
7. Termination. Either party may terminate this Agreement at any time with or without cause by giving 30 days written notice to the other party. In the event of termination, the balance of the Fund shall be equally divided between the two parties.

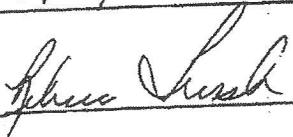
IN WITNESS WHEREOF, the parties have executed this Agreement effective FEBRUARY, 27<sup>th</sup> in the year 2012.

ELECTRONIC AUCTION SERVICES, INC.  
EASI.

by:   
Bert Koberna MATT WIDDOES

Title: Vice-President of Sales

Date: 2/27/2012

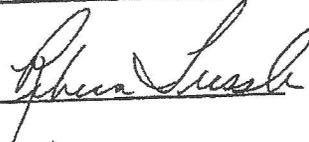
Witness: 

Lake County ESC

by:   
Brian Bontempo

Title: Superintendent

Date: 2/27/2012

Witness: 

Agreement Between

Organizational Effectiveness Strategies, Inc. and Lake County Educational Service  
Center

Organizational Effectiveness Strategies, Inc. ("OE Strategies") and Lake County ESC, set forth this Cross Service Provider Agreement for the provision, subject to the terms and conditions of this Agreement, of a non-exclusive, non-transferrable license to sell each other's services worldwide:

WHEREAS, OE Strategies, Inc. has developed, produced and marketed various services for public education institutions; and

WHEREAS, Lake County ESC is an Educational Service Center providing services to public education institutions including training, organizational effectiveness and other systemic approaches for addressing public education needs; and

WHEREAS, OE Strategies wishes to have Lake County ESC promote its services to public education institutions; and

WHEREAS, the parties wish to explore the viability and feasibility of promoting further synergistic efforts between the two organizations,

NOW THEREFORE, in consideration of the mutual promises and covenants contained herein, the parties agree as follows:

1. Lake County ESC agrees to expend its best efforts in connection with its consulting with public education institutions to provide, where appropriate, services of OE Strategies.
2. The parties agree that the pricing of services of OE Strategies shall be as mutually agreed between Lake County ESC and OE Strategies but if not mutually agreed, then as determined by OE Strategies. The customer shall be invoiced for those services through Lake County ESC and/or in a way as is mutually acceptable to the parties if the customer directs otherwise.
3. The parties expressly agree that OE Strategies retains any and all property rights to its services and that if this Agreement is terminated, Lake County ESC shall not market or sell the services of OE Strategies.

4. The parties also expressly agree that any and all services developed and produced by Lake County ESC shall remain the property of Lake County ESC and, in the event this Agreement is terminated, OE Strategies agrees not to market or sell any services of Lake County ESC.
5. Each party shall be responsible for its own actions and shall indemnify and hold the other harmless for any and all claims and liabilities made against the other as a result of its wrongful acts or omissions.
6. This Agreement is in effect for one year from and after the effective date and will automatically renew for additional one year terms. The parties agree that this Agreement may be modified from time to time provided that any said modification shall be reduced in writing and signed by both parties thereto.
7. Termination. Either party may terminate this Agreement at any time with or without cause by giving 30 days written notice to the other party. In the event of termination, the balance of the Fund shall be equally divided between the two parties.

IN WITNESS WHEREOF, the parties have executed this Agreement effective \_\_\_\_\_ in the year 2012.

Organizational Effectiveness Strategies, Inc.

Lake County ESC

by: *Suzanne Miklos*  
Suzanne M. Miklos

by: *[Signature]*  
Brian Bontempo

Title: Chief Executive Officer

Title: Superintendent

Date: 2/20/2012

Date: 2/27/2012

Witness: *Jeanette Seiling*

Witness: *Rebecca Lusker*

# Local Government Innovation Fund Program

*Application Score* £ £

<b>Lead Applicant</b>	
<b>Project Name</b>	

	<b>Grant Application</b>
--	--------------------------

**or**

	<b>Loan Application</b>
--	-------------------------

The Local Government Innovation Fund Council  
77 South High Street  
P.O. Box 1001  
Columbus, Ohio 43216-1001  
(614) 995-2292

## Local Government Innovation Fund Project Scoring Sheet

### Section 1: Financing Measures

Financing Measures	Description	Criteria	Max Points	Applicant Self Score	Validated Score
<b>Financial Information</b>	<i>Applicant includes financial information (i.e., service related operating budgets) for the most recent three years and the three year period following the project. The financial information must be directly related to the scope of the project and will be used as the cost basis for determining any savings resulting from the project.</i>	Applicant provides a thorough, detailed and complete financial information	5		
		Applicant provided more than minimum requirements but did not provide additional justification or support	3		
		Applicant provided minimal financial information	1		
		<b>Points</b>			
<b>Repayment Structure (Loan Only)</b>	<i>Applicant demonstrates a viable repayment source to support loan award. Secondary source can be in the form of a debt reserve, bank participation, a guarantee from a local entity, or other collateral (i.e., emergency rainy day , or contingency fund, etc.).</i>	Applicant clearly demonstrates a secondary repayment source.	5		
		Applicant does not have a secondary repayment source.	0		
		<b>Points</b>			
<b>Local Match</b>	<i>Percentage of local matching funds being contributed to the project. This may include in-kind contributions.</i>	70% or greater	5		
		40-69.99%	3		
		10-39.99%	1		
		<b>Points</b>			
<b>Total Section Points</b>					

### Section 2: Collaborative Measures

Collaborative Measures	Description	Criteria	Max Points	Applicant Self Score	Validated Score
<b>Population</b>	<i>Applicant's population (or the population of the area(s) served) falls within one of the listed categories as determined by the U.S. Census Bureau. Population scoring will be determined by the <b>smallest</b> population listed in the application. Applications from (or collaborating with) small communities are preferred.</i>	Applicant (or collaborative partner) is not a county and has a population of less than 20,000 residents	5		
		Applicant (or collaborative partner) is a county but has less than 235,000	5		
		Applicant (or collaborative partner) is not a county but has a population 20,001 or greater.	3		
		Applicant (or collaborative partner) is a county with a population of 235,001 residents or more	3		
		<b>Points</b>			
<b>Participating Entities</b>	<i>Applicant has executed partnership agreements outlining all collaborative partners and participation agreements and has resolutions of support. (Note: Sole applicants only need to provide a resolution of support from its governing entity.)</i>	More than one applicant	5		
		Single applicant	1		
		<b>Points</b>			
<b>Total Section Points</b>					

## Local Government Innovation Fund Project Scoring Sheet

### Section 3: Success Measures

Success Measures	Description	Criteria	Points	Applicant Self Score	Validated Score
Expected Return	Applicant demonstrates as a percentage of savings (i.e., actual savings, increased revenue, or cost avoidance ) an expected return. The return must be derived from the applicant's cost basis. The expected return is ranked in one of the following percentage categories:	75% or greater	30		
		25.01% to 74.99%	20		
		Less than 25%	10		
			<b>Points</b>		
Past Success	Applicant has successfully implemented, or is following project guidance from a shared services model, for an efficiency, shared service, coproduction or merger project in the past.	Yes	5		
		No	0		
			<b>Points</b>		
Scalable/Replicable Proposal	Applicant's proposal can be replicated by other local governments or scaled for the inclusion of other local governments.	The project is both scalable and replicable	10		
		The project is either scalable or replicable	5		
		Does not apply	0		
			<b>Points</b>		
Probability of Success	Applicant provides a documented need for the project and clearly outlines the likelihood of the need being met.	Provided	5		
		Not Provided	0		
			<b>Points</b>		
<b>Total Section Points</b>					

### Section 4: Significance Measures

Significance Measures	Description	Criteria	Points Assigned	Applicant Self Score	Validated Score
Performance Audit Implementation /Cost Benchmarking	The project implements a single recommendation from a performance audit provided by the Auditor of State under Chapter 117 of the Ohio Revised Code or is informed by cost benchmarking.	Project implements a recommendation from an audit or is informed by benchmarking	5		
		Project does not implement a recommendation from an audit and is not informed by benchmarking	0		
			<b>Points</b>		
Economic Impact	Applicant demonstrates the project will a promote business environment (i.e., demonstrates a business relationship resulting from the project) and will provide for community attraction (i.e., cost avoidance with respect to taxes)	Applicant clearly demonstrates economic impact	5		
		Applicant mentions but does not prove economic impact	3		
		Applicant does not demonstrate an economic impact	0		
			<b>Points</b>		
Response to Economic Demand	The project responds to current substantial changes in economic demand for local or regional government services.	Yes	5		
		No	0		
			<b>Points</b>		
<b>Total Section Points</b>					

Section 5: Council Measures			
Council Measures	Description	Criteria	Points Assigned
Council Preference	Council Ranking for Competitive Rounds	<b>The Applicant Does Not Fill Out This Section;</b> This is for the Local Government Innovation Fund Council only. The points for this section is based on the applicant demonstrating innovation or inventiveness with the project	
<b>Total Section Points (10max)</b>			

Scoring Summary			
		Applicant Self Score	Validated Score
Section 1: Financing Measures			
Section 2: Collaborative Measures			
Section 3: Success Measures			
Section 4: Significance Measures			
<b>Total Base Points:</b>			

**Reviewer Comments**

# Local Government Innovation Fund Program

*Application Score* £ £

<b>Lead Applicant</b>	
<b>Project Name</b>	

	<b>Grant Application</b>
--	--------------------------

**or**

	<b>Loan Application</b>
--	-------------------------

The Local Government Innovation Fund Council  
77 South High Street  
P.O. Box 1001  
Columbus, Ohio 43216-1001  
(614) 995-2292

## Local Government Innovation Fund Project Scoring Sheet

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		Applicant provided more than minimum requirements but did not provide additional justification or support	<b>3</b>		
		Applicant provided minimal financial information	<b>1</b>		
		<b>Points</b>			
<b>Repayment Structure (Loan Only)</b>	<i>Applicant demonstrates a viable repayment source to support loan award. Secondary source can be in the form of a debt reserve, bank participation, a guarantee from a local entity, or other collateral (i.e., emergency rainy day , or contingency fund, etc.).</i>	Applicant clearly demonstrates a secondary repayment source.	<b>5</b>		
		Applicant does not have a secondary repayment source.	<b>0</b>		
		<b>Points</b>			
<b>Local Match</b>	<i>Percentage of local matching funds being contributed to the project. This may include in-kind contributions.</i>	70% or greater	<b>5</b>		
		40-69.99%	<b>3</b>		
		10-39.99%	<b>1</b>		
		<b>Points</b>			
<b>Total Section Points</b>					

### Section 2: Collaborative Measures

Collaborative Measures	Description	Criteria	Max Points	Applicant Self Score	Validated Score
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		Applicant (or collaborative partner) is a county but has less than 235,000	<b>5</b>		
		Applicant (or collaborative partner) is not a county but has a population 20,001 or greater.	<b>3</b>		
		Applicant (or collaborative partner) is a county with a population of 235,001 residents or more	<b>3</b>		
		<b>Points</b>			
<b>Participating Entities</b>	<i>Applicant has executed partnership agreements outlining all collaborative partners and participation agreements and has resolutions of support. (Note: Sole applicants only need to provide a resolution of support from its governing entity.)</i>	More than one applicant	<b>5</b>		
		Single applicant	<b>1</b>		
		<b>Points</b>			
<b>Total Section Points</b>					

## Local Government Innovation Fund Project Scoring Sheet

### Section 3: Success Measures

Success Measures	Description	Criteria	Points	Applicant Self Score	Validated Score
Expected Return	Applicant demonstrates as a percentage of savings (i.e., actual savings, increased revenue, or cost avoidance ) an expected return. The return must be derived from the applicant's cost basis. The expected return is ranked in one of the following percentage categories:	75% or greater	30		
		25.01% to 74.99%	20		
		Less than 25%	10		
			Points		
Past Success	Applicant has successfully implemented, or is following project guidance from a shared services model, for an efficiency, shared service, coproduction or merger project in the past.	Yes	5		
		No	0		
			Points		
Scalable/Replicable Proposal	Applicant's proposal can be replicated by other local governments or scaled for the inclusion of other local governments.	The project is both scalable and replicable	10		
		The project is either scalable or replicable	5		
		Does not apply	0		
			Points		
Probability of Success	Applicant provides a documented need for the project and clearly outlines the likelihood of the need being met.	Provided	5		
		Not Provided	0		
			Points		
<b>Total Section Points</b>					

### Section 4: Significance Measures

Significance Measures	Description	Criteria	Points Assigned	Applicant Self Score	Validated Score
Performance Audit Implementation /Cost Benchmarking	The project implements a single recommendation from a performance audit provided by the Auditor of State under Chapter 117 of the Ohio Revised Code or is informed by cost benchmarking.	Project implements a recommendation from an audit or is informed by benchmarking	5		
		Project does not implement a recommendation from an audit and is not informed by benchmarking	0		
			Points		
Economic Impact	Applicant demonstrates the project will a promote business environment (i.e., demonstrates a business relationship resulting from the project) and will provide for community attraction (i.e., cost avoidance with respect to taxes)	Applicant clearly demonstrates economic impact	5		
		Applicant mentions but does not prove economic impact	3		
		Applicant does not demonstrate an economic impact	0		
			Points		
Response to Economic Demand	The project responds to current substantial changes in economic demand for local or regional government services.	Yes	5		
		No	0		
			Points		
<b>Total Section Points</b>					

Section 5: Council Measures			
Council Measures	Description	Criteria	Points Assigned
Council Preference	Council Ranking for Competitive Rounds	<b>The Applicant Does Not Fill Out This Section;</b> This is for the Local Government Innovation Fund Council only. The points for this section is based on the applicant demonstrating innovation or inventiveness with the project	
<b>Total Section Points (10max)</b>			

Scoring Summary			
		Applicant Self Score	Validated Score
Section 1: Financing Measures			
Section 2: Collaborative Measures			
Section 3: Success Measures			
Section 4: Significance Measures			
<b>Total Base Points:</b>			

**Reviewer Comments**

## **Project Information**

### **Regionalization and Shared Services**

Ohio House Bill 153/ ORC SECTION 267.50.90. requires the Governor's Director of 21st Century Education to develop a plan for the integration and consolidation of the publicly supported regional shared services organizations. The Director shall include recommendations for implementation of the plans beginning July 1, 2012.

The purpose of this project is to introduce and implement a successful comprehensive shared services model that consolidates resources and improves efficiency among all governmental political subdivisions in Lake County. Since the concept of shared services, represents a major shift for most people in an organization. It is essential to introduce the concept of collaborating to share services in a way to ease implementation and realize cost reductions. Therefore, for successful sustainable implementation a change management model is essential.

It will be important as the process advances to design a shared service system that is responsive to the needs of the subdivision end users within each subdivision and strike an appropriate balance between their separate but related system demands. The Regional Shared Service Center system is best suited to evolve from the current ESC structure, and we expect the shared service system to become operational as early as July 1, 2012. The Lake County Educational Service Center has established and created the Lake County Regional Cooperative, in order to lead in the delivery of quality educational products, services, and operational support services for Lake County school districts and local government partners.

The Lake County Regional Cooperative was established in 2011 with support from the Lake County ESC Board of Governors. The ESC provided initial funding allocating 10 days of consulting services provided by Ronald L. Victor Ed.D. to lead the process as Regional Purchasing Director.

Representatives from various public subdivisions on a volunteer basis have provided the Cooperative with their time and effort. Most recently a Design Team was established which includes the following representatives:

Brian Bontempo, Superintendent Lake County ESC, Chairman  
Maggie Lynch, Superintendent Auburn Career Center  
Lee Bodnar, Chief Fiscal Officer Painesville Twp.  
Chris Page, Director Perry Library  
Rick Taylor, CFO Painesville City Schools  
Andy Unetic, CFO City of Painesville  
Ron Victor, President Leadership Ideas Project Coordinator  
David McCarty, Independent Regional Service Specialist Program Facilitator

The Lake County Regional Cooperative aligns with the Local Government Innovation Fund established criteria:

#### **Efficiency**

óA single entity realizing savings through process improvements

#### **Shared Services**

óMultiple entities working together on existing services to achieve efficiency in delivery of specific services

#### **Coproduction**

óMultiple entities providing increased services at a savings over cost standards

#### **Merger**

óMultiple entities joining as one unit to achieve efficiency in delivery of specific services

The Lake County Educational Service Center is seeking a grant award of \$100,000.00 to provide for planning and management for the Lake County Regional Cooperative shared services program. This grant will help to create an office, governance structure, and marketing tools providing for sustainability. This grant will allow Lake County Regional Cooperative to replicate our services so they can be provided to other political subdivisions desiring to establish an innovative and custom-build program.

The Lake County Educational Service Center, one of 56 in Ohio, in response to Governor John Kasich's February 2011 Executive Budget proposal, which sought to fill the \$8.5 billion budget gap and streamline state and local government, embarked on the task of creating the "Lake County Regional Cooperative: A Shared Service Program

that works!ö in the spring of 2011. The purpose being to establish and create a regional shared service center envisioning that this center would bring together political subdivisions, school districts, municipal corporations, townships, counties, regional planning commissions, joint planning councils, port authorities, emergency planning districts, or other body, corporate and political, responsible for governmental activity to create a shared service delivery system.

The superintendent, as directed by the Board of Governors for the Lake County ESC, began the project by inviting representatives from political subdivisions in Lake County to a meeting in May of 2011. (Attachments 1a and 2) Over 45 representatives interested in the concept of sharing services attended this meeting. The meeting agenda (attachment 3) included an activity, titled Force Field Analysis, to gather data as to the driving forces and restraining forces compelling moving forward with a shared services cooperative project. (Attachment 4 power point presentation) The data gathered from this activity provided information to establish a clear direction as to how to move forward with the project. (Attachments 5 and 6 driving and restraining force results)

Key to the success in establishing a cooperative such as a regional share service program is the identification of barriers to successful implementation. Unfreezing existing attitudes is challenging and in itself, the ability to not change can sabotage the process. Shifting attitudes is challenging for most people in any organization. Therefore, how business is done must change. Successful shared services initiatives in have required change management in order to move beyond superficial attempts.

There are two primary elements to change management that will be incorporated into this grant. One is the people side of change in which there needs to be a process of transition to gain understanding, commitment, and behavioral alignment to a new way of doing business. There are three distinct phases in this process and they address: 1. the unfreezing of the old ways of thinking. 2. developing a new way of working. 3. creating accountability for sustaining the new model. This research-based approach can be delivered in a workshop setting with re-usable tools that leaders incorporate into the process of shared services. In our experience, the evolution of shared services moves along a continuum that starts with administrative low risk purchasing and moves toward more complex integrated shared business services aligned with best practices to support educational quality. Efficiency, quality, and service should all increase as the model becomes more fully implemented and embraced by the subdivisions. Change management is critical to the evolutionary process.

The second element to change management is the business process component. The business process tools help leaders and teams identify, through process mapping and design, what element of business process need to be modified to support Shared Services. We see that much like electrical plugs and outlets, the fit is critical. Tools help educational leaders focus on the connectivity rather than be stalled by problems during implementation phases. Organizations participating in Shared Services benefit from understanding each other's processes and developing a shared model of the connectivity to the shared service. Our proposal includes modifying the process improvement tools, via the partnerships with Leadership Ideas and O.E. Strategies, for the specific needs of the participating districts so that tools can be packaged into a standard toolkit for ongoing use to achieve the two elements listed above.

From the initial meeting a program implementation process was developed by Leadership Ideas, a collaborative partner in the project, that included a second meeting (Attachment 7) to respond the results of the Force Field Analysis and explore the development of the Lake County Regional Cooperative. The meeting agenda (Attachment 8) included an activity to discover and establish program opportunities to begin moving forward in gathering data to establish a regional cooperative purchasing component to the Lake County Shared Services Program. (Attachment 9 power point presentation) The data gathered from this activity provided program opportunities to begin, waste removal and the purchasing of paper and copiers. Technology support was identified as a future program opportunity. (Attachment 10, notes from program opportunity activity)

The implementation process includes the creation of a Lake County Regional Cooperative Design Team (Attachment 11). A survey has been conducted to determine additional program opportunities to be included in the purchasing calendar for 2012. (Attachment 12) The Lake County ESC has partner with EASi to provide the tool of the reverse auction in the bid process to aid in the acquisition of the best and most cost effective cost to subdivisions. (Attachment 13).

**Project Type**

The Lake County Regional Cooperative grant application identifies this project as a planning management project.

**Targeted Approach/Return on investment/Probability of proposal success/Plan to replicate program/  
Partner collaboration/Response to current demand/Continuous Audit plan/Improve business environment**

Key to implementing the Regional Purchasing component of the Lake County Regional Cooperative is the concept of the Reverse Auction. EASi, a collaborative partner in the project, provides this tool, providing the opportunity to consolidate purchasing efforts for school systems and other public entities within Lake County. The ability to identify and correctly conduct bids that leverage the increased volume of multiple entities purchasing the same goods and services under the same terms will allow us to realize savings based on economies of scale and administrative efficiencies. Furthermore we believe that the application of specific purchasing processes and technology administered in a centralized manner will create additional savings multiples, and reduce the need for redundant administration of like bids across various purchasing verticals. The Lake County ESC has engaged with a consulting partner called EASI to conduct a 12-month program to administer 12 bids that allow all Lake County public entities to commit their volume and participate in the savings. In addition, this bid will also be conducted using state of the art reverse auction technology to enhance the opportunity for price reduction across the ten categories.

The management agreement with EASI engages them to provide the following services during the 12-month engagement

1. Data analysis of spend categories that would benefit from a regional procurement approach
2. Collection of current spend data and contract terms from all potential participating organizations
3. The development of a defined and repeatable bid process that maximizes savings and conforms to all Ohio procurement laws relative to public agencies
4. Strategic Sourcing process and execution for each bid within the framework of discovering additional qualified vendors for each of the proposed cooperative purchasing categories
5. Development of an online RFX and price collection management portal with which to administer all components of the bid process
6. Training for Lake County ESC personnel to enable bid administration to be executed by the ESC after the 12 month management project engagement
7. A financial plan that allows the bid program administration to be self-sustaining and scalable on its own after 12 months.
8. A marketing plan to deliver this model to other ESCs across the state.
9. A plan for validating all projected savings and an online real-time reporting mechanism that tracks projected contract values, projected savings to benchmark, and actual savings to benchmark
10. Development of a calendar and milestone dates for all contemplated bids to be administered through the cooperative.

The following spend categories will be administered as joint bids with pricing accessible to all public entities within Lake County:

1. Office Supplies/Paper
2. HVAC and rood maintenance
3. Outsource therapy services (Nurses, Speech Language Pathologists, Occupation Therapists, Physical Therapists)
4. Outsourced Student Transportation
5. Waste Removal Services
6. Outsource IT services
7. IT Hardware/Software
8. Fuel
9. Vehicles
10. Food Services and Supplies
11. Janitorial Supplies

EASi will be collecting current spend data including contract pricing, contract terms, volume and pricing from other cooperatives not using reverse auction. Bid layouts will be constructed in an online portal for each spend category and a schedule for qualification responses will be released. Vendors

will turn in their qualification response and a determination will be made relative to their ability to perform or provide the service or product required. All qualified vendors will be trained on participating in the online RFX and pricing process, and EASI will host and proctor the event. An attached PowerPoint delineates the full online procurement process map in addition to displaying screenshots of the software interface. Throughout the process, EASI will be training ESC employees so that they can conduct the RFP and online price collection processes them at the conclusion of the 12-month feasibility period. Spend will be tracked via an online ordering system that will allow all participating entities to log-in and select products and the pre-negotiated pricing. This spend data can be monitored and benchmarked real-time to validate total savings to budget.

Each vendor will be required to build into their pricing a transactional fee. The fee will be invoiced to the winning vendor as the contract is fulfilled throughout the term. Those fees will be used to cover all software licensing and development fees, all personnel and administrative costs, any leftover dollars will be reinvested in identifying more spend categories, and growing the cooperative across county lines and throughout the state of Ohio.

## Explanation of anticipated return on investment based on the ration of expected savings

Column one indicates the category

Column two is an example using one project entity

Column three projects a county wide spend

Column four indicated the projected savings,

Column five indicates the total projected county spend

Column six shows the ESC projected revenue

Column seven is the projected three savings

Column eight is the % of savings projected

Category	Willoughby Spend	Countywide Spend	Projected Savings	Total Projected County Spend	Total ESC Revenue Year 2	Three Year Projected Savings	% Savings
Office Supplies	\$ 230,923.00	\$ 923,692.00	\$ 166,264.56	\$ 757,427.44	\$ 7,290.24	\$ 498,793.68	0.18
HVAC/Roof Maintenance	\$ 85,000.00	\$ 340,000.00	\$ 88,400.00	\$ 251,600.00	\$ 2,421.65	\$ 265,200.00	0.26
Outsourced Therapy Services	\$ 104,325.00	\$ 417,300.00	\$ 91,806.00	\$ 325,494.00	\$ 3,132.88	\$ 275,418.00	0.22
Outsourced Student Transportaion	\$ 6,300,000.00	\$ 6,300,000.00	\$ 1,953,000.00	\$ 4,347,000.00	\$ 41,839.88	\$ 5,859,000.00	0.31
Waste Management	\$ 31,000.00	\$ 124,000.00	\$ 38,440.00	\$ 85,560.00	\$ 823.52	\$ 115,320.00	0.31
Outsourced IT Services	\$ 108,945.00	\$ 435,780.00	\$ 108,945.00	\$ 326,835.00	\$ 3,145.79	\$ 326,835.00	0.25
IT Hardware/Software	\$ 131,339.00	\$ 525,356.00	\$ 147,099.68	\$ 378,256.32	\$ 3,640.72	\$ 441,299.04	0.28
Fuel	\$ 451,605.00	\$ 1,806,420.00	\$ 325,155.60	\$ 1,481,264.40	\$ 14,257.17	\$ 975,466.80	0.18
Vehicles	\$ 83,000.00	\$ 332,000.00	\$ 49,800.00	\$ 282,200.00	\$ 2,716.18	\$ 149,400.00	0.15
Food Services and Supplies	\$ 697,319.00	\$ 2,789,276.00	\$ 613,640.72	\$ 2,175,635.28	\$ 20,940.49	\$ 1,840,922.16	0.22
Janitorial Supplies	\$ 203,350.00	\$ 813,400.00	\$ 122,010.00	\$ 691,390.00	\$ 6,654.63	\$ 366,030.00	0.15
<b>Total</b>	<b>\$ 8,426,806.00</b>	<b>\$ 14,807,224.00</b>	<b>\$ 3,704,561.56</b>	<b>\$ 11,102,662.44</b>	<b>\$ 106,863.13</b>	<b>\$ 11,113,684.68</b>	<b>0.2501861</b>



382 Blackbrook Road  
Painesville, Ohio 44077  
Phone 440-350-2563  
Fax 440-350-2566

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Brian Bontempo, Ed.D., Superintendent

ATTACHMENT 7

July 14, 2011

Thank you for attending the first meeting to discuss a countywide-shared services program on May 27, 2011. My objective was to introduce and discuss how we can begin a program of shared services for Lake County. As I mentioned, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the taxpayer dollars in the wisest way. The Lake County Educational Service Center would like to play a key role in development of a cost-effective sustainable-shared services program.

At our first meeting in May we participated in a Force Field Analysis that established the driving and restraining forces that might support or become barriers to shared services programs. The next step is to work together to capitalize on the forces driving us to create a sustainable cost-effective shared services program and overcome any identified barriers that are in the way of the development of a successful program. I have attached the results of the discussion.

The Lake County Educational Service Center intends to seek funding for the development of a model for the planning, implementation and evaluation of a shared services program in accordance with Am.Sub. H.B.153.

I invite you to join with me to continue to explore and develop a shared services model in Lake County. This meeting will be held at the **Lake County Educational Service Center located at 382 Blackbrook Road on Friday September 16, 2011 at 9:30 a.m.** At this meeting, we will identify a starting point in which to begin!

Please RSVP your attendance to Becky Tressler at [rtressler@lakeesc.org](mailto:rtressler@lakeesc.org) or call (440) 350-2563, Ext. 734.

Sincerely,

A handwritten signature in black ink, appearing to read "B. Bontempo".

Dr. Brian Bontempo, Superintendent

**The Percentage of local matching funds available**

14% for Contract for Regional Purchasing Director (10 days @ 436.33 per day-\$4363.30) , P-16 Coordinator (9 days @ 303.80 per day-\$2734.20), Administrative Assistant (9 days @ 263.92 per day) and secretarial and office space (\$5000.00).

*Law Director*  
THOMAS LOBE, L.P.A.

*Director of Finance*  
FRANK J. BRICHACEK, JR.

*Assistant Finance Director*  
DEBBIE DOLES

*Engineer*  
RICHARD IAFELICE, P.E., P.S.

*Building Commissioner*  
FRED WYSS, JR.

*Safety Director*  
ROBERT M. WEGER

# City of Willoughby Hills

35405 Chardon Road, Willoughby Hills, Ohio 44094-9195  
Phone (440) 946-1234 FAX 975-3535

Robert M. Weger, Mayor

*Council*  
CHRISTOPHER L. BIRO  
NANCY E. FELLOWS  
DAVID M. FIEBIG  
FRANK A. GERMANO  
KEVIN D. MALECEK  
DAVID A. REICHEL  
RAYMOND C. SOMICH

*Council Clerk*  
VICTORIA A. SAVAGE, CMC

February 23, 2012

Lake County Educational Service Center  
Shared Services Regional Cooperative  
382 Blackbrook Rd.  
Painesville, Ohio 44077

Dear Sirs:

As Mayor for the City of Willoughby Hills, in this time of economic struggle, we as leaders must place priorities in the proper perspective as our stakeholders seek transparency and to learn how government agencies are utilizing the tax payer dollars in the wisest way.

There is a new role for Educational Service Centers. In meetings that have been conducted across the state, Randy Cole, Controlling Board President and Policy Advisor, has stated, "A plan will be developed over the next year and the new system will be in place beginning July 1, 2012. Shared services, such as human resources, IT, and purchasing, occur when government entities work together to provide better services or to drive down costs."

It is envisioned that Regional Shared Services Centers will be created by merging the various regional service providers. The Lake County Educational Service Center has established the Lake County Shared Services Regional Cooperative.

The City of Willoughby Hills and I support, endorse and will promote and participate in the important work of the Lake County Shared Services Regional Cooperative.

Sincerely,



Robert M. Weger, Mayor

RMW:gm



April 2, 2012

Ronald Victor  
Lake County Educational Service Center  
382 Blackbrook Rd.  
Painesville, Ohio 44077

RE: Application Cure Letter

Dear Ronald Victor:

The Ohio Department of Development (Development) has received and is currently reviewing your application for Round 1 of Local Government Innovation Fund program. During this review Development has determined that additional information is needed for your application. The identified item(s) requiring your attention are listed on the attached page(s). Please respond only to the issues raised. Failure to fully address all the identified items could lead to a competitive score reduction or ineligibility for Round 1 of the Local Government Innovation Fund program. **A written response from the applicant to this completeness review is due to Development no later than 5:00 p.m. on April 30, 2012.** Please send the response in a single email to [lgif@development.ohio.gov](mailto:lgif@development.ohio.gov) and include "Cure—Project Name" in the subject line.

While this cure letter represents the additional information needed for Development review, the Local Government Innovation Council continues to reserve the right to request additional information about your application.

Thank you once again for your participation in Local Government Innovation program. Please contact the Office of Redevelopment at [lgif@development.ohio.gov](mailto:lgif@development.ohio.gov) or 614-995-2292 if you have further questions regarding your application or the information requested in this letter.

Sincerely,

Thea J. Walsh, AICP  
Deputy Chief, Office of Redevelopment  
Ohio Department of Development

## Local Government Innovation Fund Completeness Review

**Applicant:** Lake County ESC  
**Project Name:** Regionalization and Shared Services  
**Request Type:** Grant

### Issues for Response

#### 1. Match

A minimum of 10% match is required for all projects. Matching funds must be 10% of the **total project cost** (not 10% of the funding request). Please document your 10% match and provide evidence of the contribution.

For **in-kind contributions**, please provide documentation as outlined in section 2.06 of the Local Government Innovation Fund program policies. Certification of in-kind contributions may only be made for past investments. Anticipated in-kind contributions must be certified **after** the contribution is made.

#### 2. Budget

Please provide a line item budget that includes at minimum: 1) the sources of all funds being contributed to the project include **all** sources—cash, in-kind, etc.; 2) the uses of all funds (provide a line item for each use); 3) the total project costs (including the funding request **and** the local match. Please be sure that all uses of funds are eligible expenses as set forth in the program guidelines.

##### *Example:*

#### **Collaboration Village's Project Budget**

##### **Sources of Funds**

LGIF Request	\$100,000
<u>Match Contribution (10%)</u>	<u>\$ 11,111</u>
Total	\$111,111

##### **Uses of Funds**

<u>Consultant Fees for Study</u>	<u>\$111,111</u>
Total	\$111,111

**Total Project Cost: \$111,111**

#### 3. Population Information and Documentation

Please provide documentation supporting population information provided using the 2010 U.S. Census. To access census information, you may visit the following website <http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml>.

#### 4. Resolutions of Support

Resolutions of support must be provided by the governing body of the main applicant and each collaborative partner. If the collaborative partner is a private entity with no governing body, a letter of support **for the project** is required.

## **5. Partnership Agreements**

Partnership agreements must be signed by all parties listed as collaborative partners. Please provide a partnership agreement that at minimum: 1) lists all collaborative partners; 2) lists the nature of the partnership; and 3) is signed by all parties. Please note, partnership agreements must be specific to the project for which funding is requested.

Thea J Walsh, AICP  
Deputy Chief, Office of Redevelopment  
Ohio Department of Development  
77 South High Street  
P.O. Box 1001  
Columbus, Ohio 43216-1001

RE: Application Cure Letter

Applicant: Lake County ESC  
Project Name: Regionalization and Shared Services  
Request Type: Grant

Response to Issues:

### 1. Match

**Attachment 1:** Pay Date Earnings Register from 07/01/2011 to 06/30/12 for Ronald L. Victor (P-16 Regional Shared Services Coordinator) provided by Sherri Samac, Treasurer Lake County Educational Service Center. Total match: \$13,667.76

### 2. Budget

#### Lake County ESC Shared Service Regional Cooperative

#### Sources of Funds

LGIF Request	\$100,000.00	
Match Contribution (10%)	\$ 13,667.76	See Pay Date Earnings Register from 07/01/2011 to 06/30/12 for Ronald L. Victor (P-16 Regional Shared Services Coordinator)
Total	\$113,667.76	

#### Uses of Funds

Software development and Licensing Fees: \$55,000

The deliverable at the end of twelve months is a branded portal owned by the Lake County ESC that can conduct cooperative bids through the RFP and Online pricing process. Licenses on spend management and audit software up to 50 users is included.

Program management: \$20,000

One resource will be assigned to manage the bid calendar construct the RFPs and bidding interfaces and train Lake County ESC performance throughout the year.

Change management toolkits, marketing and participation tools: \$20,000

Leadership Ideas will be assigned to coordinate the project, promote the cooperative bids and develop and execute a marketing plan that will attract participants first inside of Lake County and then throughout the State of Ohio.

O.E. Strategies will the development of change management toolkits.

Web hosting, equipment, and site development and design: \$5000

Hosted secured software servers and a fully functional web-site will be created and managed as the central entry point to the shared services portal.

**Subtotal of all requested funds: \$100,000.00**

**Local match:**

P-16 Regional Shared Services Coordinator \$13,667.76

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**Total Project Cost \$113,667.76**

### 3. Population Information and Documentation

**Attachment 2: U.S. Census Bureau American FactFinder Total Population 2010 Census Summary File 1 for Lake County Ohio**

**Total Population-230,041**

### 4. Resolutions/Letters of Support

**Attachment 3: Letters of Support from collaborative partners**

Resolution by the Lake County ESC Governing Board (**To Be Approved Tuesday May 8, 2012**)

EASi

O.E. Strategies

Leadership Ideas

**5. Signed Partnership Agreements by all collaborative partners:**

**Attachment 4: EASi**

O.E. Strategies

Leadership Ideas

# Attachment 1

DATE: 05/04/12  
 TIME: 15:34:06  
 PAGE: 1 (ERNREG)

PAY DATE EARNINGS REGISTER  
 FROM 07/01/2011 TO 06/30/2012

LAKE COUNTY EDUCATIONAL SERVICE CENTER  
 382 BLACKBROOK RD  
 PAINESVILLE, OH 44077

PAY DATE	CHK NO	JOB	GROSS	DOCK	NET	DED. CODE	DED. AMT	BD. AMT	FND-FUNC-OBJ-SPCC-SUBJECT-OPU-IL-JOB	CHARGE	%	
					FOR: 070802941			NAME: VICTOR, RONALD				
07/08/11	540606	01	1217.02	0.00	1195.23	IFED. TAX	164.02		1001 2990 111 0000 000000 000 00 000	608.51	50.00	
07/08/11	540606	02	398.15	0.00		IST. TAX	38.68		1018 2212 111 9022 000000 000 00 000	608.51	50.00	
			*** DIRECT DEPOSIT ***				IWILLO	32.30		1001 2990 111 0000 000000 000 00 000	398.15	100.00
						ISTRSANPK	161.52					
						IMEDICARE	23.42					
						IDIR DEP	1195.23					
			1615.17	0.00	1195.23	!*TOTALS*	1615.17				1615.17	
07/25/11	540763	01	1216.99	0.00	1195.17	IFED. TAX	164.01		1001 2990 111 0000 000000 000 00 000	608.49	50.00	
07/25/11	540763	02	398.10	0.00		IST. TAX	38.68		1018 2212 111 9022 000000 000 00 000	608.50	50.00	
			*** DIRECT DEPOSIT ***				IWILLO	32.30		1001 2990 111 0000 000000 000 00 000	398.10	100.00
						ISTRSANPK	161.51					
						IMEDICARE	23.42					
						IDIR DEP	1195.17					
			1615.09	0.00	1195.17	!*TOTALS*	1615.09				1615.09	
09/09/11	541290	01	1812.50	0.00	1332.58	IFED. TAX	190.66		1018 2212 111 9022 000000 000 00 000	1812.50	100.00	
			*** DIRECT DEPOSIT ***				IST. TAX	45.48				
						IWILLO	36.25					
						ISTRSANPK	181.25					
						IMEDICARE	26.28					
						IDIR DEP	1332.58					
			1812.50	0.00	1332.58	!*TOTALS*	1812.50				1812.50	
10/07/11	541870	01	1312.50	0.00	984.56	IFED. TAX	123.16		1018 2212 111 9022 000000 000 00 000	1312.50	100.00	
			*** DIRECT DEPOSIT ***				IST. TAX	28.25				
						IWILLO	26.25					
						ISTRSANPK	131.25					
						IMEDICARE	19.03					
						IDIR DEP	984.56					
			1312.50	0.00	984.56	!*TOTALS*	1312.50				1312.50	
11/10/11	542080	01	1062.50	0.00	810.55	IFED. TAX	89.41		1018 2212 111 9022 000000 000 00 000	1062.50	100.00	
			*** DIRECT DEPOSIT ***				IST. TAX	19.63				
						IWILLO	21.25					
						ISTRSANPK	106.25					
						IMEDICARE	15.41					
						IDIR DEP	810.55					
			1062.50	0.00	810.55	!*TOTALS*	1062.50				1062.50	
12/09/11	542496	01	1750.00	0.00	1289.07	IFED. TAX	182.22		1018 2212 111 9022 000000 000 00 000	1750.00	100.00	
			*** DIRECT DEPOSIT ***				IST. TAX	43.33				
						IWILLO	35.00					
						ISTRSANPK	175.00					
						IMEDICARE	25.38					
						IDIR DEP	1289.07					
			1750.00	0.00	1289.07	!*TOTALS*	1750.00				1750.00	
01/10/12	542910	01	1125.00	0.00	855.37	IFED. TAX	96.53		1018 2212 111 9022 000000 000 00 000	1125.00	100.00	

DATE: 05/04/12  
 TIME: 15:34:06  
 PAGE: 2 (ERNREG)

PAY DATE EARNINGS REGISTER  
 FROM 07/01/2011 TO 06/30/2012

LAKE COUNTY EDUCATIONAL SERVICE CENTER  
 382 BLACKBROOK RD  
 PAINESVILLE, OH 44077

PAY DATE	CHK NO	JOB	GROSS	DOCK	NET	DED.CODE	DED.AMT	BD.AMT	IFND-FUNC-OBJ-SPCC-SUBJECT-OPU-IL-JOB	CHARGE	%	
					FOR: 070802941			NAME: VICTOR, RONALD				
*** DIRECT DEPOSIT ***						IST. TAX	21.79					
						IWILLO	22.50					
						ISTRSANPK	112.50					
						IMEDICARE	16.31					
						IDIR DEP	855.37					
			1125.00	0.00	855.37	!*TOTALS*	1125.00				1125.00	
02/10/12	543310	01	1250.00	0.00	942.38	IFED. TAX	113.40		1018 2212 111 9022 000000 000 00 000	1250.00	100.00	
*** DIRECT DEPOSIT ***						IST. TAX	26.09					
						IWILLO	25.00					
						ISTRSANPK	125.00					
						IMEDICARE	18.13					
						IDIR DEP	942.38					
			1250.00	0.00	942.38	!*TOTALS*	1250.00				1250.00	
03/09/12	543741	01	1500.00	0.00	1116.39	IFED. TAX	147.15		1018 2212 111 9022 000000 000 00 000	1500.00	100.00	
*** DIRECT DEPOSIT ***						IST. TAX	34.71					
						IWILLO	30.00					
						ISTRSANPK	150.00					
						IMEDICARE	21.75					
						IDIR DEP	1116.39					
			1500.00	0.00	1116.39	!*TOTALS*	1500.00				1500.00	
04/10/12	544177	01	625.00	0.00	502.50	IFED. TAX	31.42		1018 2212 111 9022 000000 000 00 000	625.00	100.00	
*** DIRECT DEPOSIT ***						IST. TAX	7.02					
						IWILLO	12.50					
						ISTRSANPK	62.50					
						IMEDICARE	9.06					
						IDIR DEP	502.50					
			625.00	0.00	502.50	!*TOTALS*	625.00				625.00	
** TOTALS **			13667.76	0.00	10223.80	IFED. TAX	1301.98		1001 2990 111 0000 000000 000 00 000	2013.25		
						IST. TAX	303.66		1018 2212 111 9022 000000 000 00 000	11654.51		
						IWILLO	273.35					
						ISTRSANPK	1366.78					
						IMEDICARE	198.19					
						IDIR DEP	10223.80					
						!*TOTALS*	13667.76		***** ACCOUNT TOTALS *****	13667.76		

DATE: 05/04/12  
 TIME: 15:34:06  
 PAGE: 3 (ERNREG)

PAY DATE EARNINGS REGISTER  
 FROM 07/01/2011 TO 06/30/2012

LAKE COUNTY EDUCATIONAL SERVICE CENTER  
 382 BLACKBROOK RD  
 PAINESVILLE , OH 44077

\*\*\*\*\*  
 \* GRAND TOTALS \*  
 \*\*\*\*\*

	GROSS	DOCK	NET	IDED.CODE	DED.AMT	BD.AMT	IFND-FUNC-OBJ-SPCC-SUBJECT-OPU-IL-JOB	CHARGE
TOTALS	13667.76	0.00	10223.80					
				FED. TAX	1301.98		!001 2990 111 0000 000000 000 00 000	2013.25
				ST. TAX	303.66		!018 2212 111 9022 000000 000 00 000	11654.51
				WILLO	273.35		!	
				STRSANPK	1366.78		!	
				MEDICARE	198.19		!	
				DIR DEP	10223.80		!	
				*TOTALS*	13667.76		! ** ACCOUNT TOTALS **	13667.76

## **Attachment 3**

### **Resolution**

#### **Lake County Educational Service Center Governing Board**

WHEREAS, The Lake County Educational Service Center (ESC). has developed, a Shared Services Regional Cooperative providing a P-16 Shared Services Coordinator for this project that supports shared services for institutions and political subdivisions; and

WHEREAS, Lake County ESC is an Educational Service Center providing services to public education institutions including training, organizational effectiveness and other systemic approaches for addressing public education needs; and

WHEREAS, The Lake County ESC has promoted its services to public education institutions; and

WHEREAS, The Lake County ESC wishes to explore the viability and feasibility of promoting further synergistic efforts of a shared services regional cooperative through a grant provided through the Local Government Innovation Fund,

NOW THEREFORE BE IT RESOLVED THAT, The Lake County ESC Governing Board supports this project and provides this resolution recognizing the potential benefit of the Lake County Shared Service Regional Cooperative.

### Attachment 3

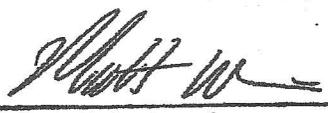
To: The Grant Committee

This is a letter of support for The Lake County Regional Cooperative in its pursuit of a grant to support planning and management of shared services. EASi (E Auction Services) has entered into a collaborative agreement with the Lake County Educational Service Center (ESC). The ESC provides services to public education institutions, which includes training organizational effectiveness and other systemic approaches for addressing public education needs. EASi has developed, produced and marketed reverse auction services for public education institutions and political subdivisions. We have been engaged with the ESC and are aware of their leadership in pursuit of alliances that improve quality and cost effectiveness.

The Lake County Regional Cooperative was established and created by ESC in order to lead in the delivery of quality educational products, services and operational support for Lake County school districts and local government partners. Representatives from various public subdivisions, on a volunteer basis, have provided the Cooperative with their time and effort. Having worked with this team before, the degree of collaboration, creativity and commitment to the continuous improvement of education across Ohio gives me 100% confidence in the positive outcomes.

EASi Auction Services

Name:

  
~~Ben Koberna~~ MATT WIDDOS

Title: Chief Executive Officer

Date: May 4, 2012



Organizational Effectiveness  
**STRATEGIES**  
Work Better.

To: The Grant Committee

This is a letter of support for The Lake County Regional Cooperative in its pursuit of a grant to support planning and management of shared services. Organizational Effectiveness Strategies, Inc. ("OE Strategies") has entered into a collaborative agreement with the Lake County Educational Service Center (ESC). The ESC provides services to public education institutions which includes training organizational effectiveness and other systemic approaches for addressing public education needs. OE Strategies has developed, produced and marketed various services for public education institutions. We have been engaged with the ESC and Leadership Ideas and are aware of their leadership in pursuit of alliances that improve quality and cost effectiveness.

The Lake County Regional Cooperative was established and created by ESC in order to lead in the delivery of quality educational products, services and operational support for Lake County school districts and local government partners. Representatives from various public subdivisions, on a volunteer basis, have provided the Cooperative with their time and effort. Having worked with this team before, the degree of collaboration, creativity and commitment to the continuous improvement of education across Ohio gives me 100% confidence in the positive outcomes.

Organizational Effectiveness Strategies, Inc.

  
Suzanne M. Miklos

Title: Chief Executive Officer

Date: May 4, 2012

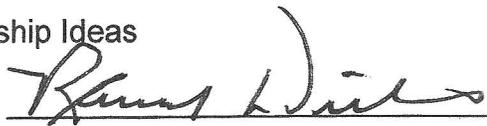


To: The Grant Committee

This is a letter of support for The Lake County Regional Cooperative in its pursuit of a grant to support planning and management of shared services. Leadership Ideas has entered into a collaborative agreement with the Lake County Educational Service Center (ESC). The ESC provides services to public education institutions, which includes training organizational effectiveness and other systemic approaches for addressing public education needs. Leadership Ideas has developed, produced and marketed shared services startup services for public education institutions and political subdivisions in Ohio. We have been engaged with the ESC and are aware of their leadership in pursuit of alliances that improve quality and cost effectiveness.

The Lake County Regional Cooperative was established and created by ESC in order to lead in the delivery of quality educational products, services and operational support for Lake County school districts and local government partners. Representatives from various public subdivisions, on a volunteer basis, have provided the Cooperative with their time and effort. Having worked with this team before, the degree of collaboration, creativity and commitment to the continuous improvement of education across Ohio gives me 100% confidence in the positive outcomes.

Leadership Ideas

Name: 

Title: Chief Executive Officer

Date: May 4, 2012

together

**B. Resolution to approve employee contributions for healthcare for the period of August 1, 2012 through July 31, 2023 as follows: 10 % for Plan 1, 12 % for Plan 2, 18 % for Plan 3.**

Motion: Forte Second: Raddiffe  
Discussion: \_\_\_\_\_  
The vote: RD  DF  BK  AR  JB   
President declares the motion: carried failed

with in view of  
C. \$2,500<sup>00</sup>  
for family

**C. Resolution to approve the 2012-2013 school year for the Lake County Educational Service Center personnel a 2 % increase in salary with or without a step increase:**

Motion: [Signature] Second: [Signature]  
Discussion: \_\_\_\_\_  
The vote: DF \_\_\_\_\_ BK \_\_\_\_\_ AR \_\_\_\_\_ JB \_\_\_\_\_ RD \_\_\_\_\_  
President declares the motion: carried failed

**SECTION III**

**SUPERINTENDENT RECOMMENDS:**

**A. Resolution to approve the following:**

WHEREAS, The Lake County Educational Service Center (ESC). has developed, a Shared Services Regional Cooperative providing a P-16 Shared Services Coordinator for this project that supports shared services for institutions and political subdivisions; and

WHEREAS, Lake County ESC is an Educational Service Center providing services to public education institutions including training, organizational effectiveness and other systemic approaches for addressing public education needs; and

WHEREAS, The Lake County ESC has promoted its services to public education institutions; and

WHEREAS, The Lake County ESC wishes to explore the viability and feasibility of promoting further synergistic efforts of a shared services regional cooperative through a grant provided through the Local Government Innovation Fund,

NOW THEREFORE BE IT RESOLVED THAT, The Lake County ESC Governing Board supports this project and provides this resolution recognizing the potential benefit of the Lake County Shared Service Regional Cooperative.

Motion: Dawson Second: BRUSZ  
Discussion: \_\_\_\_\_  
The vote: BK  AR  JB  RD  DF   
President declares the motion: carried failed

## **Attachment 4**

### Agreement Between

#### EASi. and Lake County Educational Service Center

EASi and Lake County ESC, set forth this Cross-Provider of Services Agreement for the provision, subject to the terms and conditions of this Agreement, of a non-exclusive, non-transferrable license to sell each other's services worldwide:

WHEREAS, EASi has developed, produced and marketed various services for public education institutions; and

WHEREAS, Lake County ESC is an Educational Service Center providing services to public education institutions including training, organizational effectiveness and other systemic approaches for addressing public education needs; and

WHEREAS, EASi wishes to have Lake County ESC promote its services to public education institutions; and

WHEREAS, the parties wish to explore the viability and feasibility of promoting further synergistic efforts between the two organizations,

NOW THEREFORE, in consideration of the mutual promises and covenants contained herein, the parties agree as follows:

1. Lake County ESC agrees to expend its best efforts in connection with its consulting with public education institutions to provide, where appropriate, services of EASi.
2. The parties agree that the pricing of services of EASi shall be as mutually agreed between Lake County ESC and EASi but if not mutually agreed, then as determined by EASi. The customer shall be invoiced for those services through Lake County ESC and/or in a way as is mutually acceptable to the parties if the customer directs otherwise.
3. The parties expressly agree that EASi retains any and all property rights to its services and that if this Agreement is terminated, Lake County ESC shall not market or sell the services of EASi.
4. The parties also expressly agree that any and all services developed and produced by Lake County ESC shall remain the property of Lake County

ESC and, in the event this Agreement is terminated, EASI agrees not to market or sell any services of Lake County ESC.

5. Each party shall be responsible for its own actions and shall indemnify and hold the other harmless for any and all claims and liabilities made against the other as a result of its wrongful acts or omissions.

6. This Agreement is in effect for one year from and after the effective date and will automatically renew for additional one year terms. The parties agree that this Agreement may be modified from time to time provided that any said modification shall be reduced in writing and signed by both parties thereto.

7. Termination. Either party may terminate this Agreement at any time with or without cause by giving 30 days written notice to the other party. In the event of termination, the balance of the Fund shall be equally divided between the two parties.

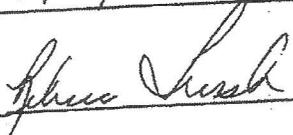
IN WITNESS WHEREOF, the parties have executed this Agreement effective FEBRUARY, 27<sup>th</sup> in the year 2012.

ELECTRONIC AUCTION SERVICES, INC.  
EASI.

by:   
Ben Koberna MATT WIDDOES

Title: Vice-President of Sales

Date: 2/27/2012

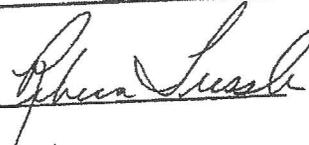
Witness: 

Lake County ESC

by:   
Brian Bontempo

Title: Superintendent

Date: 2/27/2012

Witness: 

Agreement Between

Organizational Effectiveness Strategies, Inc. and Lake County Educational Service Center

Organizational Effectiveness Strategies, Inc. ("OE Strategies") and Lake County ESC, set forth this Cross Service Provider Agreement for the provision, subject to the terms and conditions of this Agreement, of a non-exclusive, non-transferrable license to sell each other's services worldwide:

WHEREAS, OE Strategies, Inc. has developed, produced and marketed various services for public education institutions; and

WHEREAS, Lake County ESC is an Educational Service Center providing services to public education institutions including training, organizational effectiveness and other systemic approaches for addressing public education needs; and

WHEREAS, OE Strategies wishes to have Lake County ESC promote its services to public education institutions; and

WHEREAS, the parties wish to explore the viability and feasibility of promoting further synergistic efforts between the two organizations,

NOW THEREFORE, in consideration of the mutual promises and covenants contained herein, the parties agree as follows:

1. Lake County ESC agrees to expend its best efforts in connection with its consulting with public education institutions to provide, where appropriate, services of OE Strategies.
2. The parties agree that the pricing of services of OE Strategies shall be as mutually agreed between Lake County ESC and OE Strategies but if not mutually agreed, then as determined by OE Strategies. The customer shall be invoiced for those services through Lake County ESC and/or in a way as is mutually acceptable to the parties if the customer directs otherwise.
3. The parties expressly agree that OE Strategies retains any and all property rights to its services and that if this Agreement is terminated, Lake County ESC shall not market or sell the services of OE Strategies.

4. The parties also expressly agree that any and all services developed and produced by Lake County ESC shall remain the property of Lake County ESC and, in the event this Agreement is terminated, OE Strategies agrees not to market or sell any services of Lake County ESC.
5. Each party shall be responsible for its own actions and shall indemnify and hold the other harmless for any and all claims and liabilities made against the other as a result of its wrongful acts or omissions.
6. This Agreement is in effect for one year from and after the effective date and will automatically renew for additional one year terms. The parties agree that this Agreement may be modified from time to time provided that any said modification shall be reduced in writing and signed by both parties thereto.
7. Termination. Either party may terminate this Agreement at any time with or without cause by giving 30 days written notice to the other party. In the event of termination, the balance of the Fund shall be equally divided between the two parties.

IN WITNESS WHEREOF, the parties have executed this Agreement effective \_\_\_\_\_ in the year 2012.

Organizational Effectiveness Strategies, Inc.

by: Suzanne Miklos  
Suzanne M. Miklos

Title: Chief Executive Officer

Date: 2/20/2012

Witness: Jeanette Seiling

Lake County ESC

by: Brian Bontempo

Title: Superintendent

Date: 2/27/2012

Witness: Rebecca Lusker

## Agreement Between

### Leadership Ideas and Lake County Educational Service Center

Leadership Ideas and Lake County ESC, set forth this Cross Service Provider Agreement for the provision, subject to the terms and conditions of this Agreement, of a non-exclusive, non-transferrable license to sell each other's services worldwide:

WHEREAS, Leadership Ideas has developed, produced and marketed various services for public education institutions; and

WHEREAS, Lake County ESC is an Educational Service Center providing services to public education institutions including training, organizational effectiveness and other systemic approaches for addressing public education needs; and

WHEREAS, Leadership Ideas wishes to have Lake County ESC promote its services to public education institutions; and

WHEREAS, the parties wish to explore the viability and feasibility of promoting further synergistic efforts between the two organizations,

NOW THEREFORE, in consideration of the mutual promises and covenants contained herein, the parties agree as follows:

1. Lake County ESC agrees to expend its best efforts in connection with its consulting with public education institutions to provide, where appropriate, services of Leadership Ideas.
2. The parties agree that the pricing of services of Leadership Ideas shall be as mutually agreed between Lake County ESC and Leadership Ideas but if not mutually agreed, then as determined by Leadership Ideas. The customer shall be invoiced for those services through Lake County ESC and/or in a way as is mutually acceptable to the parties if the customer directs otherwise.
3. The parties expressly agree that Leadership Ideas retains any and all property rights to its services and that if this Agreement is terminated, Lake County ESC shall not market or sell the services of Leadership Ideas.

4. The parties also expressly agree that any and all services developed and produced by Lake County ESC shall remain the property of Lake County ESC and, in the event this Agreement is terminated, Leadership Ideas agrees not to market or sell any services of Lake County ESC.
5. Each party shall be responsible for its own actions and shall indemnify and hold the other harmless for any and all claims and liabilities made against the other as a result of its wrongful acts or omissions.
6. This Agreement is in effect for one year from and after the effective date and will automatically renew for additional one year terms. The parties agree that this Agreement may be modified from time to time provided that any said modification shall be reduced in writing and signed by both parties thereto.
7. Termination. Either party may terminate this Agreement at any time with or without cause by giving 30 days written notice to the other party. In the event of termination, the balance of the Fund shall be equally divided between the two parties.

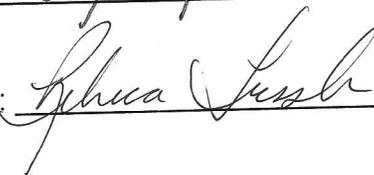
IN WITNESS WHEREOF, the parties have executed this Agreement effective \_\_\_\_\_ in the year 2012.

Leadership Ideas

by:   
 Ronald L. Victor

Title: President

Date: 2/22/12

Witness: 

Lake County ESC

by:   
 Brian Bontempo

Title: Superintendent

Date: 2/27/2012

Witness: 



Attachment 2

P1

TOTAL POPULATION  
Universe: Total population  
2010 Census Summary File 1

NOTE: For information on confidentiality protection, nonsampling error, and definitions, see <http://www.census.gov/prod/cen2010/doc/sf1.pdf>.

	Lake County, Ohio
Total	230,041

Source: U.S. Census Bureau, 2010 Census.