Review of the Business Operations of the Clark County School District

December 2018

Dr. Jesus F. Jara, Superintendent of the Clark County School District (CCSD), requested that the Council of the Great City Schools (CGCS) conduct a high-level management review of the school district's business operations.[1] He requested that the Council --

- Review, evaluate, and comment on the structure and operations of the district's Office of the Chief Operating Officer, including several of the departments within that organization (Facilities, Purchasing, Transportation), and provide comparisons, metrics, and other benchmarking data on how the district spends its funds and provides services.[2]

- Identify opportunities to improve existing processes, internal controls, organizational structures, spans of control, and communications within and between departments.

- Develop recommendations that would assist the Office of the Chief Operating Officer in achieving greater operational efficiency, effectiveness, and would enhance its strategic value to the school district.

The Council used two approaches to fulfill these requests. The first approach involved a survey of divisions and departments asking them to rate themselves on a series of industry "best practices and indicators" and to provide documentation and detailed explanations to support the rating. The completed survey was returned to the Council and reviewed prior to a site visit described below. A full copy of the completed survey, which includes survey components, analysis, and scoring can be found in Attachment E of this management letter.

The second approach involved an onsite visit to the Clark County School District (Nevada). The Council assembled a Strategic Support Team (the team) of senior managers from other major urban city school systems across the country. These individuals have extensive experience in school business operations, facilities, school construction, technology, and strategic planning. The team was composed of the following persons. (Attachment A provides brief biographical sketches of team members.)

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[1] The Council has conducted over 300 organizational, instructional, management, and operational reviews in over 60 big city school districts over the last 20 years. The reports generated by these reviews are often critical, but they also have been the foundation for improving the operations, organization, instruction, and management of many urban school systems nationally. In other cases, the reports are complimentary and form the basis for identifying "best practices" for other urban school systems to replicate. (Attachment F lists the reviews that the Council has conducted.)

[2] The Council team was unable to review the food services operations of the school district, but it agreed to return to do so and to provide more in-depth analysis of transportation operations.

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The team reviewed the survey, other key documents, and data provided by the district before and during a four-day site visit on November 13-16, 2018. The general schedule for the site

visit is described below, and the complete working agenda for the site visit is presented in Attachment B.

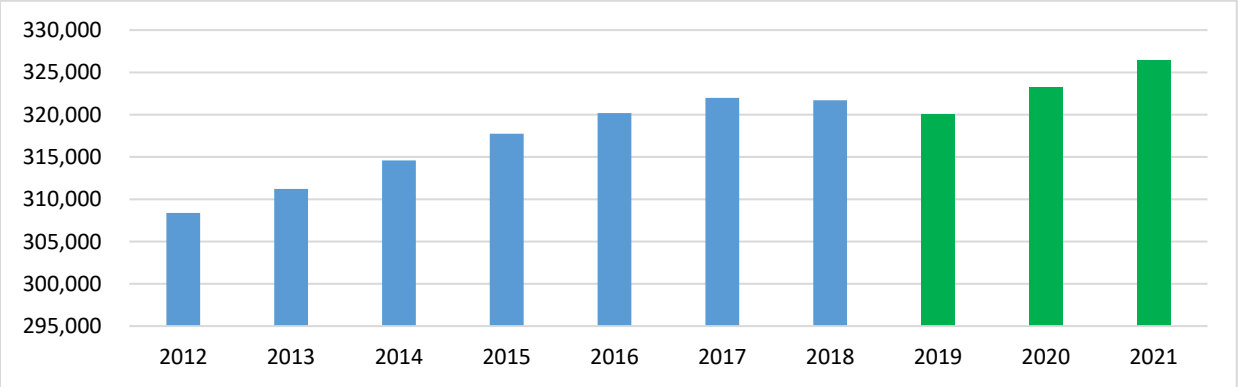
The team met with Superintendent Jara and Chief of Staff, Jennifer Cupid-McCoy, during the evening of the first day of the site visit to discuss expectations and objectives for the review and make final adjustments to the work schedule. The team used the second and third days of the site visit to conduct interviews with key staff members (a list of individuals interviewed is included in Attachment C), and examine additional documents and data (a complete list of documents reviewed is included in Attachment D).[3] The final day of the visit was devoted to synthesizing and refining the team's findings and recommendations and providing the Superintendent and Chief of Staff with a briefing on the team's preliminary findings.

The Council sent the draft of this document to team members for their review to affirm the accuracy of the report and to obtain their concurrence with the final recommendations. This management letter contains the findings, comparative data, and recommendations that have been designed by the team to help improve the operational efficiency and effectiveness of the Clark County School District's business operations.

Clark County School District

Clark County School District, the fifth largest school district in the nation,[4] operates 360 schools (226 elementary schools, 59 middle schools, 49 high schools, 19 alternative schools, and seven special schools). The district covers a geographic area of approximately 7,910 square miles[5] and currently educates a diverse enrollment of over 320,000 students, supported by nearly 41,800 employees.[6] Exhibit 1 below displays seven years of enrollment history, and projects an upward enrollment through 2020-2021.[7]

Exhibit 1. CCSD History and Projected PK-12 Enrollment



Source: CGCS, Using Data Provided by the CCSD

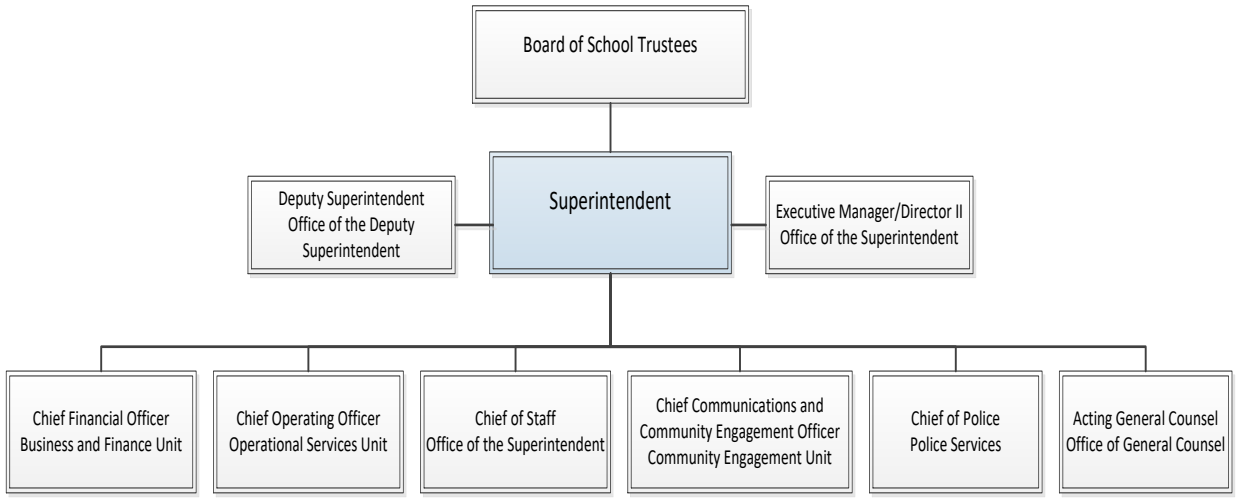
[3] The Council's reports are based on interviews with district staff and others, a review of documents, observations of operations, and professional judgment. The team conducting the interviews must rely on the willingness of those interviewed to be truthful and forthcoming but cannot always judge the accuracy of statements made by interviewees.
[4] Source: https://newsroom.ccsd.net/wp-content/uploads/2018/01/5730.2-Fast-Facts-English-rev.1.19.18.pdf .
[5] Source: *Ibid.*
[6] Source: CCSD *Employee Count by Group* Monthly Report, dated November 1, 2018.
[7] Source*:* FY18 CCSD Comprehensive Annual Fiscal Report.

The CCSD general operating fund budget for FY19 is $2.457 billion. CCSD is funded through a combination of local sales tax (41.4% of the total general operating fund revenue), state funding (31.3%), property tax funding (19.1%), government services tax, federal support and other (5.7%), and opening fund balance (2.5%).[8]

The Clark County Board of School Trustees governs and is responsible for policymaking and oversight of the Clark County School District. The board is an elected body made up of seven individuals, one from each district within the county, that are elected to four-year staggered terms. The Vision Statement of the Board reads: *All students progress in school and graduate prepared to succeed and contribute in a diverse global society*.

The board appoints the Superintendent of Schools, who is responsible to the board for the efficient and effective operation of the school system. The superintendent is responsible for the competent management of the district's resources. Exhibit 2 below shows the organizational structure of the Office of the Superintendent and his eight direct reports.

Exhibit 2. Office of the Superintendent Organizational Chart



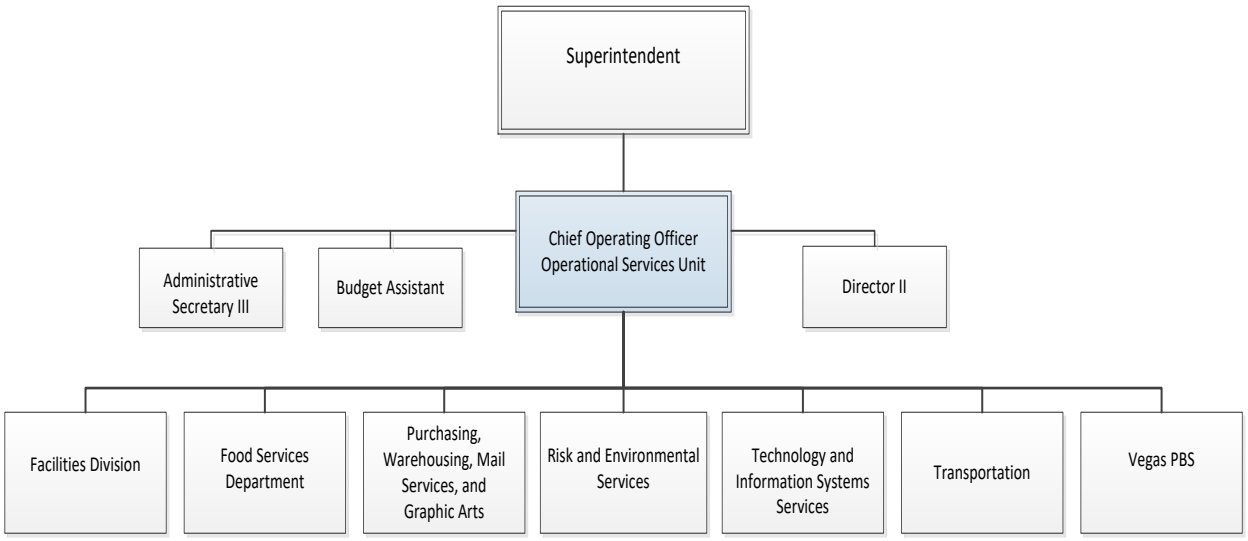
Source: CGCS, Using Data Provided by the CCSD

Office of the Chief Operating Officer

The Chief Operating Officer (COO), who is a direct report to the Superintendent, has responsibility for Facilities; Food Services; Purchasing, Warehousing, Mail Services, and Graphic Arts; Risk and Environmental Services; Technology and Information Systems Services; Transportation; and the Vegas PBS. Exhibit 3 below presents an overview of the COO's functional organizational structure and Exhibit 4 provides general staffing and budget information for the departments reporting to the COO.

[8] Source: CCSD *Fast Facts* 2018-2019, located at: https://newsroom.ccsd.net/wp-content/uploads/2018/10/Fast-Facts-2018-19-Eng.pdf .

Exhibit 3. Office of the Chief Operating Officer Organizational Chart



Source: CGCS, Using Data Provided by the CCSD

Exhibit 4. Staffing[9] and Budget Data for Departments Reporting to the Chief Operating Officer

Staffing and Budget Data for Departments Reporting to the Chief Operating Officer											
Department	FY18	FY19	FY18	FY19	FY2016		FY2017		FY2018		FY2019
	FTE		Total Positions		Budget	Actual	Budget	Actual	Budget	Actual	Budget
Office of the COO	3.00	2.80	3.00	3.00	$ -	$ -	$ 235,750	$ 290,111	$ 618,662	$ 527,651	$ 530,999
Facilities Division	2,065.66	2,137.18	2,254.00	2,220.00	510,205,544	244,727,943	739,511,349	421,090,301	856,883,261	467,701,571	906,634,520
Food Services	496.94	530.11	3,166.00	3,483.00	125,213,541	120,267,508	130,178,415	124,511,653	145,490,791	121,269,558	152,289,825
Purchasing, Warehousing, Mail Services , and Graphic Arts	81.05	81.05	84.00	84.00	9,741,059	8,543,812	10,116,864	7,768,098	9,191,372	8,139,938	8,946,327
Risk and Enviornmental Services	42.00	41.00	43.00	42.00	24,867,784	29,393,041	27,009,869	29,762,916	27,837,532	30,578,651	28,515,984
Technology and Informations Systems	184.50	188.12	186.00	199.00	38,680,989	42,832,754	45,372,695	42,978,491	41,959,598	39,676,681	41,638,814
Transportation	1,513.54	1,503.92	2,261.00	2,303.00	125,650,153	114,950,922	124,961,381	121,174,478	127,866,188	122,233,653	130,765,169
Vegas PBS	80.00	69.00	90.00	79.00	10,809,172	14,244,994	14,183,970	14,364,830	13,560,450	13,484,522	14,332,854
Total	**4,466.69**	**4,553.18**	**8,087.00**	**8,413.00**	**845,168,241**	**574,960,974**	**1,091,570,293**	**761,940,878**	**1,223,407,854**	**803,612,225**	**1,283,654,492**

Source: CGCS, Using Data Provided by the CCSD Chief Financial Officer

Findings

The findings of the Council's Strategic Support Team are organized around six general areas: Commendations, Leadership and Management, Organization, Operations, Survey of Best Practices, and Performance Metrics and Comparisons. These findings[10] are followed by recommendations in each area.

[9] FTE and position totals are presented for comparison only as school-site custodial staff are no longer reported as facilities division employees.

[10] Review teams often identify areas of concern that may go beyond the intended scope of the project. As a service to our member districts, any concern that rises to a high-level is included in the report.

Commendations

- Even with a history of salary and longevity freezes, many support staff members interviewed maintain a "can-do" and "caring" attitude toward their work.

- District policy requires that school buses be replaced on staggered 14-year cycles.

- The district's practice of using prototypical design and a kit-of-parts concept has reduced new construction costs over the years and has increased flexibility at diverse site configurations.

- The team noted that CCSD scored in the "best quartile" on multiple 2016-2017 CGCS *Managing for Results*[11] operations Key Performance Indicators (KPI).[12] Exhibit 5 below displays CCSD best quartile rankings of departments included in this review.

Exhibit 5. Best Quartile Ranking of CCSD Key Performance Indicators

Function	Key Performance Indicator	CCSD	CGCS National Median
Maintenance and Operations	Custodian Supply Cost Per Square Foot	$0.01	$0.11
	Recycling - Percent of Total Material Stream	42.90%	23.40%
	Work Order Completion Time (Days)	1	16
Purchasing	Procurement Savings Ratio	6.90%	3.00%
	Strategic Sourcing Ratio	84.10%	30.70%
	Warehouse Stock Turn Ratio	7.70	3.90
Transportation	Bus Fleet - Alternatively-Fueled Buses	100%	16%

Source: CGCS KPI Project

- The district's science kit management and procurement strategy is considered a best practice and has provided significant district savings.

- The building department is managing inspections effectively, tracking 90-95 percent of inspections completed within 24 hours of receipt of request.

- The district is restarting a badly needed facilities condition assessment program to determine facility needs.

[11] The Council's *Managing for Results* report is a Performance Measurement and Benchmarking Project that identifies performance measures, key indicators, and best practices that can guide the improvement of non-instructional operations in urban school districts across the nation.
[12] A key performance indicator (KPI) is a type of performance measurement.

Leadership and Management

- There appears to be a culture in the district of relying on out-of-date practices with no apparent sense of urgency to bring it into the 21st century and generate needed change. For example--

  - Business plans with goals and objectives, benchmarks, accountabilities, timelines, deliverables, cost estimates, cost-benefit analysis, return on investment, and other analytics are generally not used or required. To illustrate--

    - Transportation is considering introducing a new bus type to the fleet at the cost of several million dollars. No business plan was available for the team to review;

    - The facility division has numerous system initiatives underway without clear evidence of implementation or change-management plans;

    - There was little evidence of analysis of costs of using contracted services to fill staffing needs, especially in the current tight labor market and considerable vacancies in facilities and transportation. Additionally, there appeared to be little consideration of contracted staff augmentation to adjust staffing to the up-and-down cycles of bond-funded capital programs and decreasing the need for periodic reductions in force; and

    - The team found no business case or analysis justifying what work could be performed more cost effectively by district staff vs. the cost of contracting or purchasing for the same services or products from outside vendors. With the critical shortage of in-house trades staff, personnel could be repurposed to more cost-effective tasks and projects. For example--

      - The team saw district staff constructing new cabinets for classrooms. The team was very confident that cabinets could be refurbished or replaced far more cost effectively by procuring "ready-made" cabinets,

  - There was no uniform methodology for identifying or establishing opportunities for continuous improvement, cost savings, or revenue generation. For example--

    - Contracted providers were generally not evaluated. There were no documented instances of vendor removal due to contractor underperformance. There appeared to be minimal tracking, monitoring, or evaluation of contractor performance metrics;

    - The district is accepting less than currently competitive rebate revenues from the P-Card provider that the district is now contracting with. A more competitive rebate rate has the potential to increase district rebate revenues several hundred thousand dollars annually;
    - The use of P-Cards is not fully leveraged to reduce cycle times, purchase order costs, or improve efficiencies in the procurement of low-value non-contract purchases;

- There was no energy management or conservation program in place. Formal energy conservation plans, goals, or staff training to achieve any level of cost savings do not exist, and there was no one designated to manage an outside entity if one were to be brought in;

- The district does not utilize Leadership in Energy and Environment Design (LEED) certified projects, resulting in higher energy costs to the district when new construction comes online; and

- There was a general lack of knowledge about the E-Rate program in technology purchases that could result in lost revenue opportunities.

- The team saw no evidence that the district has an up-to-date long-term facilities master plan;

- The team found no evidence of a formal plan for predictive, preventive, or routine maintenance programs, which has caused a considerable (and growing) unfunded deferred maintenance[13] backlog currently estimated to be in the six-billion-dollar range. No formal process identifies or prioritizes deferred maintenance projects. There was no replacement cycle plan for school-site mechanical equipment and other site needs. As a result --

  - When facility (roof, HVAC, life safety, security, plumbing, electrical, etc.) systems are not proactively maintained, these systems follow an accelerated deterioration curve and fail prematurely, sometimes years *before* their designed life expectancy;

  - Deferring maintenance magnifies many times over the costs of maintaining a school facility;

  - Work orders and emergency calls from schools become the sole drivers or determinants of maintenance activity, resulting in the maintenance department not able to engage in proactive measures to ensure that critical equipment and systems are maintained to maximize lifetime effectiveness; and

[13] Deferred maintenance is a measure of the preventive and regular maintenance, minor and capital repairs, and capital system and component replacements that are needed to extend the life of the facility to achieve its projected life expectancy but that have been postponed to a future date beyond the recommended service interval or breakdown. Deferred maintenance results in a) increased overall costs of managing and operating facilities; b) increased incidence of unplanned and more costly urgent and emergency repairs; c) increased incidence of disruptions to delivering instructional programs; d) increased risk of defaults on warranties of equipment and building components; and e) premature failure of buildings and equipment, requiring significant and often unbudgeted capital expenditures and their accompanying debt-service costs. (Source: CGCS publication, *Reversing the Cycle of Deterioration in the Nation's Public School Buildings*, October 2014.)

  - There was no consideration of vertical construction to reduce campus footprints, especially in areas of higher real estate costs. The district appears averse to multi-story buildings, which limits site acquisition options.

- There was a lack of communication channels up-and-down and side-to-side within and between departments and outside agencies. The team was told that --

  - Departments work in silos with little communication between and among staff teams;

  - Maintenance was not involved in the implementation of the current maintenance management software platform procured and, as a result, there is a reluctance to use it;

  - Key department staff are not at the collective bargaining table nor are they asked for input on potential bargaining agreement changes that could affect their operations;

  - There was no feedback loop from the team handling construction warranties to the construction management group to affect future designs, lessons learned, or to be used as input on contractor evaluations;

  - There was weak intra-and interdepartmental collaboration because regular staff meetings do not exist at all levels;

  - A communications resource in the facilities department dedicated to bond issues has had minimal collaboration and communication with the district's community engagement office staff;

  - Requests, such as the extensive deployment of security cameras for forensic purposes (over 130 cameras in an elementary school), are made without any clear articulation as to the operational benefits to justify additional construction costs; and

  - The lack of coordinated communication with local government jurisdictions has caused delays and potentially additional construction costs.

- Although the district's Police Services Department's organizational chart shows the presence of an emergency management office, several staff members interviewed indicated the district lacks an integrated emergency management framework and are unaware of, or have not participated in, the district's use of scenario-based tabletop drills.

- The team found few analytical tools, such as surveys and key performance indicators (KPIs), used to measure and compare performance to increase effectiveness, achieve greater efficiencies, set targets, or guide process or continuous improvement efforts. To illustrate--

- Although the district annually solicits feedback from students, parents, and staff regarding central services,[14] this survey does not seek student or parent feedback on their perception of the quality of all direct business services received, such as food and transportation;[15] and

- Although the district submits data into the CGCS annual KPI survey, *Managing for Results,*[16] the team found little evidence the data was leveraged to measure the effectiveness or performance levels of departments and their sub-units, or to identify positive and negative trending.

- The team heard a number of challenges faced by departments as a result of the implementation of Assembly Bill 469.[17] Specifically --

  - Custodial resources and staff were shifted to school sites under the management of the principal; however, the "central office" must provide and pay for custodial substitutes. This practice minimizes the incentive for schools to require high levels of custodian attendance;

  - It was reported that principals have the authority to change bell schedules, irrespective of resulting hardships that may affect the transportation department and its resources;

  - There appears to be no centralized program or procedure in place for the rental of school facilities and other facility-use transactions. As a result--

    - Schools operating independently in this area have the potential to violate leases and other real estate contracts;

    - Many properties provided to the district through the Bureau of Land Management (BLM) come with specific restrictions. The team was told that some school principals are entering into agreements that allow easements that may conflict with current BLM-CCSD agreements; and

    - There is the potential for a significant lack of fund accountability when principals make financial agreements with after-hour school-building users without appropriate internal controls in place.

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[14] The Central Services Survey is required by Nevada Assembly Bill 469, Section 31 to be administered annually to gauge central services staff members' perceptions of their own workplace and ability to serve schools as well as school staff perceptions of central services and satisfaction with the services provided by central services. Source: https://aarsi.ccsd.net/research/central-services-survey/ .

[15] The team was told that previously some departments conducted their own customer satisfaction surveys, but no longer do so.

[16] The Council's *Managing for Results* report is a performance measurement and benchmarking tool that identifies performance measures, key indicators, and best practices that can guide the improvement of non-instructional operations in urban school districts across the nation.

[17] AB 469 transferred more authority, accountability, and responsibility to local schools. This bill was signed into law on May 8, 2017, by Nevada Governor, Brian Sandoval. Source: http://gov.nv.gov/News-and-Media/Press/2017/Governor-Sandoval-Signs-CCSD-Reorganization-Implementation-Bill,-Other-Measures-into-Law/ .

- The team heard multiple examples of a lack of due diligence, a lack of appropriate internal controls in place, or a lack of best practices being followed. For example --

    - The failure to appropriately review land surveys and underground utility locations have resulted in structures being built over monitoring wells or gas lines that were damaged during construction;

    - Managers and supervisors are in the same collective bargaining unit of the employees they supervise and evaluate;

    - Potential conflicts exist when the *same* few district staff are assigned to the committees that make procurement decisions, as independent third parties are not included on these committees;

    - The Office of the General Counsel does not routinely review architect, engineer, and construction contracts;

    - Documented departmental policies, processes, and procedures, customarily used for quality control, improving productivity, and increasing effectiveness and efficiencies are inconsistent or nonexistent in departments;

    - Purchasing department staff members do not participate in, provide expertise for, or exercise professional oversight in the construction contracting process, even though an independent 2005 audit[18] of construction management recommended that procurement activities should be conducted by the purchasing department; and

    - The management of bond funds and the management of construction work are co-mingled in the same division. As a result, potential conflicts exist relating to reporting structures and necessary internal controls. As a best practice, other districts have addressed this by positioning bond-fund management in the division of the Chief Financial Officer, while enabling the facilities or construction division to manage the work.

- The team found no deliberative, proactive succession plan, capacity building, or cross-training in critical functions to ensure continuity in the event of leave, retirement, promotion, or resignation of crucial department staff.

- The team heard from interviewees concerns about the lack of employee training and staff development.

- The recruitment and retention of support and skilled trades[19] staff is a significant problem, due in part to--

    - The perceived low priority that the Human Resources Department appears to place on filling these vacancies;

[18] Audit conducted by Jefferson Wells Management Company, dated October 31, 2005.
[19] Trades include, at a minimum, plumbers, carpenters, electricians, and heating and air conditioning technicians.

- The time to onboard employees is not formally tracked so choke points cannot be identified and corrected;
- The competition for skilled trades workers within the region;[20]
- The lack of an exit interview requirement to track reasons why employees voluntarily separate from service; and
- Salary schedules and longevity increases repeatedly frozen for long periods. To illustrate, Exhibit 6 below tracks the starting bus-driver hourly pay rates, which increased a net total of *one percent* from 2010-2011 school year to the current 2018-2019 school year.

Exhibit 6. Bus Driver Starting Hourly Pay Rate History

School Year	Bus Driver Starting Hourly Pay Rate	Notes
2010-2011	$15.15	Steps frozen; no longevity
2011-2012	$14.90	1.625% reduction effective 1/1/2012 . Decrease salary schedules 1.125% for employee's share of PERS increase. Fund step increases through insurance reserve fund (1/2 year). Decrease salary schedule by 1/2% to cover PERS increase of 2009
2012-2013	$14.90	Salary freeze; no longevity
2013-2014	$15.20	Effective 7/1/2013. No increment movement on steps; Salary schedule raised by 2%; Longevity payments given
2014-2015	$15.20	Continuation of terms of 2013-2014 CBA (no steps / no additional raise / longevity given)
2015-2016	$15.13	0.446% reduction effective 7/1/15. Salary freeze, steps & longevity. No COLA
	$14.96	Effective 7/12/15. Per salary schedule dated 7/12/15, "Combined Contract and PERS Rate Decreases"
2016-2017	$15.13	1.125% increase - Effective 1/1/2017
	$15.30	1.125% increase - Effective 4/1/2017
2017-2018	$15.30	No Step movement, no salary increase
2018-2019	$15.30	

Source: CGCS, with Salary Schedules Provided by CCSD

Organization

- The team found numerous anomalies when reviewing department organizational charts and position data provided by the district. For example--
  - Department organizational charts were not standardized in format, depth, or file type;

[20] The team was told of multi-billion-dollar building expansions currently occurring in the region.

- Some organizational charts reviewed did not appropriately distinguish between line and staff functions;[21]

- Some position titles on organizational charts appeared mislabeled in that the position title could not be found in the online job-description listing;[22]

- Position levels (i.e., Director I, II, III, or Coordinator I, II, III) were inconsistently labeled on organizational charts. Some organizational charts simply titled the position "Director" or "Coordinator" without identifying the level, which made determining position value and scope impossible;

- Several department head position titles listed on the COO organizational chart were not the same position titles listed on organizational charts provided by the departments;

- Organizational charts did not include all positions within the department; and

- Not all position titles listed on organizational charts could be found in the position summaries provided by the district. As a result of the above--

  - What should have been a routine process of "connecting the dots" became an impossible task. In other words, the team was not able to crosswalk position titles with job descriptions with position summaries on organizational charts, all of which were necessary to confirm as appropriate each department's organizational structure, the scope of responsibilities, and staffing levels.

- Functional misalignments in the COO organizational structure were identified due to reporting relationships not appropriately positioned for a district this size. For example--

  - The Purchasing function is misaligned in that the current placement of this activity jeopardizes spending and other internal control best practices, as this function generally reports to a Chief Financial Officer;

  - The Risk and Environmental Services function is misaligned in that risk management generally reports to someone in the Office of the Superintendent or the Office of the Chief Financial Officer;

  - The Information and Technology Systems function is misaligned in that current best practices recognize this function as an essential enterprise-wide strategic responsibility and should report directly to the Office of the Superintendent;

  - Vegas PBS station oversight is misaligned in that the district's Office of Communications and Community Engagement can provide more appropriate

[21] A line function or position has authority and responsibility for achieving the major goals of the organization. A staff function or a position whose primary purpose is providing specialized expertise and assistance to line positions.
[22] Source: https://ccsd.net/employees/prospective/descriptions/ .

management and can better leverage district initiatives and community outreach along with managing this medium; and

- The Contracts, Procurement and Compliance Unit, currently located in the facilities division, is misaligned in that this function is more appropriately positioned in the Purchasing Department, where procurement and contracting best practices can be applied by experienced procurement professionals who can provide oversight of strategic contracting; the use and propriety of alternative methodologies; and a working knowledge and understanding of associated risks and benefits in construction procurement practices.

- The district's lack of a position control system has allowed more positions to be created than budgeted. The team was told that a position control system was in development.

- Many key job descriptions reviewed were found to be outdated, and many did not reflect current responsibilities and reporting relationships. For example--

  - Five of the seven department heads reporting to the COO were shown as reporting to the CFO on their job description, which had not been revised in at least ten years.

- The team found no evidence of enterprise-wide program management function, strategy or governance structure in place to coordinate strategic priorities or resolve conflicts. As a result--

  - There were no controls in place to ensure the district's leadership team has complete, accurate, and timely information to make appropriate management decisions or conduct strategic planning; and

  - There was an absence of methodologies in place to ensure that strategies, directions, and instructions from management were coherent and carried out systematically or piloted expertly.

- The team found spans of control (i.e., twenty-four direct reports to a maintenance director) too broad to be effective. Large spans of control contribute to--

  - A lack of internal controls and checks and balances due to the comingling of otherwise separate functions and duties;

  - A lack of efficiency and effectiveness;

  - The fostering of information islands and operational silos;

  - The negative impact on processes, systems, business units, management styles; and

  - Communication breakdowns where employees cannot or do not interact with each other effectively.

- Conversely, the team found one-to-one reporting relationships in several departments. In

other words, some supervisors "supervised" only one person, which is generally recognized as a poor use of resources, funds, and bloated staffing layers.

- The team found some key leadership positions held by employees who may lack the requisite experience, skill sets, or training to effectively perform the duties of the position.

- There appeared to be excessive staff layers in both transportation and facilities. Excessive staffing layers--

  - Negatively impact internal and external communications;

  - Create bottlenecks and choke points;

  - Create silo mentalities in staff;

  - Cause duplication of efforts; and

  - Inflate costs associated with excessive FTEs who are unnecessarily assigned to mid-level management and supervisory positions.

- The team saw no evidence that department organizational structures and workflows had been examined, and if staff and positions could be repurposed to achieve operational efficiencies and effectiveness.

Operations

- The team identified operational weaknesses that could create long-term negative impact or place the district at risk. Specifically--

  - There is an apparent lack of a business continuity/disaster recovery plan in place;

  - It was reported that due to funding limitations the district is no longer following the best practice of custodial inspections;

  - Consistency in custodial efforts appear to be jeopardized by transferring the oversight of the custodial function to individual school sites; and

  - Third party independent cost estimates are not used to validate construction bids, even when budgets are substantially exceeded.

- CCSD conducts an annual *Central Services Survey* that students, parents, and district staff are encouraged to participate in. These data can be used to view customer satisfaction and identify areas for improvement. Exhibit 7 below displays only the facilities and operations questions contained in the various surveys.

Exhibit 7. 2017-2018 Central Services Survey (Facilities and Operations Questions)

Student Questions and Responses (Percent Positive)	
In my experience, at this school everything works or gets fixed quickly.	63.7%
The equipment and facilities at this school work well.	84.1%
The heating and air conditioning work well at this school.	69.3%
The technology (computers, iPads, mobile devices, etc.) works well at this school.	80.1%
This school is clean.	65.6%

Parent Questions and Responses (Percent Positive)	
Teachers at my child's school keep their classrooms clean and organized.	96.9%
The equipment and facilities at my child's school work well.	93.0%
The school building is clean and well-maintained.	94.1%

Staff Questions and Responses (Percent Positive)	
The equipment and facilities at this school work well.	78.8%
The school building is clean and well-maintained.	85.7%
There are an adequate number of instructional materials and basic supplies at this school.	76.7%
There is adequate instructional space at this school.	79.8%

Source: CCSD Assessment, Accountability, Research, and School Improvement Division

- The team heard that the last time school boundaries were evaluated or changed was 1994, which seems remarkable given the amount of school construction that has taken place since then--approximately 160 schools have opened or reopened.[23]

- The large size of the district's land mass (7,910 square miles) and rapid growth have been used as justifications for not addressing obvious operational deficiencies or shortcomings when, in fact, over 90 percent of the district's schools are within a 12-mile radius of the central Las Vegas area.

- Poor employee attendance can be attributed, in part, to the current illness leave "use-it or lose-*most*-of-it" policy.[24]

- The team was told that there is a lack of cross-departmental collaboration on project data analysis, e.g., demographers do not work with research and accountability for predictive analysis.

- Several key personnel interviewed stated they were not at the table when critical decisions were made, such as strategic planning, department software procurement, or changes that impacted their operations.

- The *Central Services Survey* also solicits employee feedback regarding the department (or division) they are currently assigned. The "Admin" column is the percentage of positive responses by CCSD administrators, the "Licensed" column is the percentage of positive

[23] Source: CCSD *FY18 Comprehensive Annual Financial Report*.
[24] Per the Chief Human Resources Officer, employees that elect to "cash-out" their unused sick leave hour balance receive "pennies on the dollar."

responses by CCSD teachers, the "Support" column is the percentage of positive responses by CCSD support staff, and the "All" column are the combined percentages of positive responses to each question. Exhibit 8 below displays survey data for all employees who are assigned to the Office of the Chief Operating Officer and those departments that report to him. Similar exhibits that follow display the results of employees assigned to that specific department. This survey data can provide insight into how employees view their department.

Exhibit 8. Combined Staff Responses of all Departments Reporting to the COO

Combined Staff Responses from all Departments Reporting to the Office of the Chief Operating Officer				
(Percent Positive)	Admin	Licensed	Support	All
Received a response within two working days after contract?	51.25%	59.43%	73.72%	62.47%
The commitment to address my needs?	46.25%	51.18%	70.37%	56.34%
Professionalism of the response?	58.75%	62.56%	76.30%	66.20%
The overall satisfaction with the services provided?	52.50%	50.23%	67.88%	56.25%

Source: CCSD Assessment, Accountability, Research, and School Improvement Division

- The team also identified or heard from interviewees the following areas of concern about facilities --

  - There has been high employee turnover in the department since the passage of the 2015 bond;

  - A significant loss of district and department historical and institutional knowledge has disappeared due to the departure of an aging workforce. Also, there is some evidence of disputes and conflicts between remnants of the aging workforce and the arrival of a new, less experienced workforce;

  - Implementation of the maintenance management software system has resulted in the increased manual processing of requisitions. Additionally, the maintenance management software does not interface with the district's ERP[25] legacy platform requiring data from one system (maintenance management) to be manually entered into another (ERP) system;

  - Repairs and upgrades performed by the maintenance department are not being captured in the facilities management database, resulting in outdated facilities deficiency information;

  - Maintenance repair backlogs have resulted in school closures, the need to relocate students, and loss of instructional time. What should have been preventive or routine maintenance work was funded out of capital project accounts at significantly higher costs;

[25] Enterprise Resource Planning.

- Some maintenance work formerly completed by building engineers is now performed by less technically qualified school-site custodial staff;

- There appears to be no concerted effort to ensure every school is occupied to capacity;

- There seems to be a disconnect between the level of desired service (e.g., APPA[26] level one service) and cost impact. This is due, in part, to the decentralization of custodial services and the resulting inconsistent delivery of clear APPA standards and expectations;

- Even with a facilities software system in place, staff could not articulate work order turn times or the extent of the district's maintenance backlog;

- Using the most current maintenance and operations CGCS KPI[27] survey data entered by CCSD staff, the team noted that--

  - The CCSD custodial work cost per square foot was $2.25 vs. the CGCS median custodial work cost per square foot of $1.59 (district custodians maintain approximately 37,335,000 square feet, which includes school buildings, portable classrooms, administrative offices, and other service facilities);[28]

  - The CCSD routine maintenance cost per work order was $766.00, vs. the CGCS median routine maintenance cost per work order of $470.00;

  - The CCSD square footage custodial workload was 23,350 square feet, vs. the CGCS median square footage workload of 26,381 square feet;

  - The CCSD utility costs per square foot was $1.97 vs. the CGCS median utility costs per square foot of $1.23;

  - The CCSD electricity usage per square foot was 14.30 (KWh)[29] vs. the CGCS median electricity usage per square foot of 9.20; and

  - The CCSD water (non-irrigation) usage per square foot was 92.7 gallons, vs. the CGCS median water (non-irrigation) usage per square foot of 13.2 gallons.

- Exhibit 9 below shows the results of the Facilities Division staff survey.

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[26] In the late 1960's through the early 1990's, APPA formally stood for the Association of Physical Plant Administrators. Today, the association is known as *APPA: Leadership in Educational Facilities* and is most easily recognized and referred to as simply "APPA."

[27] Source: 2016-2017 CGCS *Managing for Results* report.

[28] Source: Undated document titled, *Creation of a Fund for Maintenance, Operations and Facility Renewal for CCSD Facilities.*

[29] Kilowatt-hour.

Exhibit 9. Staff Responses - Facilities Division Staff

Responses from Facilities Department Staff (Percent Positive)				
	Admin	Licensed	Support	All
Received a response within two working days after contract?	22.22%	40.74%	37.50%	33.96%
The commitment to address my needs?	16.67%	28.57%	37.50%	25.93%
Professionalism of the response?	27.78%	48.15%	62.50%	43.40%
The overall satisfaction with the services provided?	27.78%	27.59%	37.50%	29.09%

Source: CCSD Assessment, Accountability, Research, and School Improvement Division

- The team also identified the following areas of concern regarding purchasing and warehousing--

  - Based on vendor-spend ($98 million, which equals 14.5 percent of total department spend),[30] the allocation of staff resources to the technology and instructional section (14 buyers) in the purchasing department appears excessive;

  - Food buyers are not involved in menu planning, which, if they were, would provide better-forecasted requirements to suppliers, and it would possibly yield better pricing;

  - School board policies and regulations related to procurement appear not to be current in that some policies date to 2001;

  - The misinterpretation of aggregate limits in NRS 332[31] results in procurement delays in that staff halts all *vendor* activity at a $50,000 aggregate, regardless of number of contracts for other commodities a vendor may have with the district. The language in NRS 332 alludes to maximums *per contract* not *per vendor*. As a result, unnecessary staff time is spent identifying other vendors, and preparing and forwarding unnecessary contracts for board action;

  - Some warehouses are experiencing low stock turns and accountability because some items are not entered into inventory. Also, the management of maintenance item inventory is split between purchasing and facilities, which utilize different inventory management systems that do not communicate with each other, and both departments are warehousing duplicate items; and

  - The district warehouse lacks a locator system, which results in unnecessary staff time or delays in locating commodities and filling orders.

  - Using the most current procurement CGCS KPI survey data entered by CCSD staff, the team noted that --

    - The CCSD procurement costs per $100K revenue were $124.00 vs. the CGCS median procurement costs per $100K revenue of $97.00;

[30] Source: Department staff.
[31] Nevada Revised Statute (NRS) 332, also known as the Local Government Purchasing Act.

- The CCSD total district FTE's per procurement FTE was 694.24 vs. the CGCS district FTE's per procurement FTE median of 940.04;
- The CCSD procurement threshold for board approval is $48,804.30 vs. the CGCS median of $79,195.50;
- The CCSD procurement acquisition lead time (PALT) for an invitation for bids was 120 days vs. the CGCS median of 70 days; and
- The CCSD PALT requests for proposals was 132 days vs. the CGCS procurement acquisition lead time median of 100 days.

- Exhibit 10 below displays the results of the Purchasing Department staff survey.

Exhibit 10. Staff Responses - Purchasing Department Staff

Responses from Purchasing Department Staff (Percent Positive)				
	Admin	Licensed	Support	All
Received a response within two working days after contract?	0.00%	63.64%	72.73%	62.50%
The commitment to address my needs?	0.00%	50.00%	72.73%	56.00%
Professionalism of the response?	0.00%	72.73%	100.00%	79.17%
The overall satisfaction with the services provided?	0.00%	41.67%	81.82%	56.00%

Source: CCSD Assessment, Accountability, Research, and School Improvement Division

- The team also identified the following areas of concern regarding transportation --
  - It was reported to the team that 97 to 98 percent of buses were always in service. However, the state inspection pass rate was reported at 50 percent;
  - The team was told that approximately 20-25 new bus drivers are trained per month, yet there is still a significant ongoing bus driver shortage;
  - There was a disconnect between the time reported a new general education student (GE) could board the bus and the department policy of not allowing un-rostered students on buses. The time to place a new GE student on the bus was reported to be 24 hours (one-day). Since updated rider and route information is provided to drivers weekly, new students are riding buses before the driver has received the new student's routing information;
  - The transportation department budget was approximately 7.56 percent of the total CCSD budget. The average CGCS district school transportation budget was 4.09 percent of the district's budget, and the median was 4.20 percent of the district's budget;[32]

[32] Source: Survey of CGCS districts conducted in September 2018. Thirty-four of seventy districts responded.

- When department staff was asked how many students are transported daily, answers ranged from 120,000 to 150,000 students. When the team asked the department to verify current ridership data, the team was told the daily ridership was 113,000; and

- Using the most current transportation data from the CGCS KPI survey entered by CCSD staff, the team noted that --

  - The CCSD supervisor to bus driver ratio was 16 drivers per supervisor. The CGCS median for a supervisor to bus driver ratio was 42 drivers per supervisor, which may indicate potential CCSD overstaffing;

  - The CCSD cost for a district-operated bus was $68,318 vs. the CGCS median cost of $60,272 for a district-operated bus (CCSD operates approximately 1,640 bus routes);

  - The CCSD fuel (gasoline) cost as a percent of retail was 89.9 percent, vs. the CGCS median cost as a percent of retail of 84.9 percent; and

  - The "corrected" on-time performance for CCSD buses was 94 percent,[33] vs. the CGCS median on-time performance of 99.781 percent.

- Exhibit 11 below displays the results of the Transportation Department staff survey.

Exhibit 11. Staff Responses - Transportation Department Staff

Responses from Transportation Department Staff (Percent Positive)				
	Admin	Licensed	Support	All
Received a response within two working days after contract?	35.29%	32.35%	60.00%	40.85%
The commitment to address my needs?	29.41%	20.59%	57.89%	32.86%
Professionalism of the response?	47.06%	35.29%	65.00%	46.48%
The overall satisfaction with the services provided?	35.29%	20.59%	50.00%	32.39%

Source: CCSD Assessment, Accountability, Research, and School Improvement Division

Survey of Best Practices

As part of its peer review process, the Council periodically uses a survey instrument that enables a department or division to rate itself on a series of "best practices." The instrument was adapted from one developed by the Florida Office of Program Policy Analysis and Government Accountability (OPPAGA) and Florida's Auditor General as a model instrument to assess school system operations.

[33] The team was told that CCSD does not have the necessary staffing and supports in place to electronically monitor on-time service rates on a day-to-day basis. The CCSD current practice is for drivers to "self-report" when they arrive late (after bell) to school. Per CCSD staff, "As self-reporting process, data reported may not accurately reflect service levels."

The instrument was developed to help districts 1) use performance and cost-efficient measures to evaluate programs; 2) use appropriate benchmarks based on comparable school districts, government agencies, and industry standards; 3) identify potential cost savings; and 4) focus budget and resources on district priorities and goals, including student performance. The surveys are grounded in a set of "best practices and indicators" that were identified from extensive literature reviews, interviews of education personnel experts, representatives from professional organizations, and educators in other states.

- The survey used in the Clark County School District measured 77 standards and 338 indicators in five areas --
    - Organizational Structure, Staffing and Performance Measures that included five (5) standards and 28 practices,
    - Construction Planning that included 23 standards and 86 practices,
    - Facilities Maintenance that included 21 standards and 76 practices,
    - Student Transportation that included 19 standards and 91 practices, and
    - Purchasing, Warehousing, and Inventory that included nine (9) standards and 57 practices.
- Below is a high-level summary of how CCSD department leadership scored their use of best practices within their departments. A full copy of the completed survey, which includes survey components, analysis, and scoring, can be found in Attachment E of this management letter--
    - Organizational Structure: The Chief Operating Officer reported that his office uses 13 of 28 (46%) indicators of best organizational structure, staffing and performance measures in five standards areas;[34]
    - Construction Planning: The Director of Construction Management reported that his division uses 72 of 86 (84%) indicators of best construction measures in 23 standards areas;
    - Facilities Maintenance: The Directors of the Facility Asset Management and Facility Asset Maintenance Departments reported that their departments use 47 of 76 (62%) indicators of best construction measures in 21 standards areas;

[34] The Council requested that explanations be provided in the survey instrument and documentation compiled and made available during the site visit to support the departments compliance with the standards and best practices. Except for documents provided by the Facilities Division, the review team could not verify the veracity of the self-assessments since, in many cases, no explanations and little documentation was provided by the other departments during the site visit.

- Student Transportation: The Operations Supervisor and Director of Fleet Services reported their department uses 85 of 91 (93%) indicators of best transportation measures in 20 standards areas; and

- Purchasing and Inventory: The Purchasing Director reported his department uses 47 of 57 (82%) indicators of best purchasing and inventory measures in nine (9) standards areas.

Performance Metrics and Comparisons

This portion of the management letter provides a high-level summary of comparative data commonly used to identify a district's spending priorities and relative performance. The source of these data is the U.S. Department of Education - National Center for Education Statistics (NCES) data charts[35] and the Council of the Great City Schools KPI project.[36]

Spending Comparisons

- The team reviewed NCES CCSD data on expenditures per student in several key financial categories using the most current NCES financial data available (2014-15). These data were used to compare CCSD with other CGCS urban school districts nationwide. In general, the results indicated that Clark County School District ranked better or significantly better than the adjusted CGCS median[37] in school-site administration staff expenditures per student, central office administrator expenditures per student, and operations, business services and other expenditures per student, but was significantly lower in total expenditures per student, and instructional expenditures per student. Larger instructional expenditures are generally preferred, and smaller non-instructional expenditures are preferred since more dollars are available to the classroom. Specifically, the data showed--

  - CCSD total expenditure per student[38] was $8,964, compared to the adjusted CGCS median in 2014-2015 (again, the most recent federal data available) of $13,730 per student. The CCSD expenditure per student was the lowest of all CGCS reporting districts (see Exhibit 12);

  - CCSD average instructional expenditure per student[39] that year was $4,796, compared to the Great City School median of $6,656 per student, which placed CCSD near the bottom of all CGCS reporting districts (see Exhibit 13);

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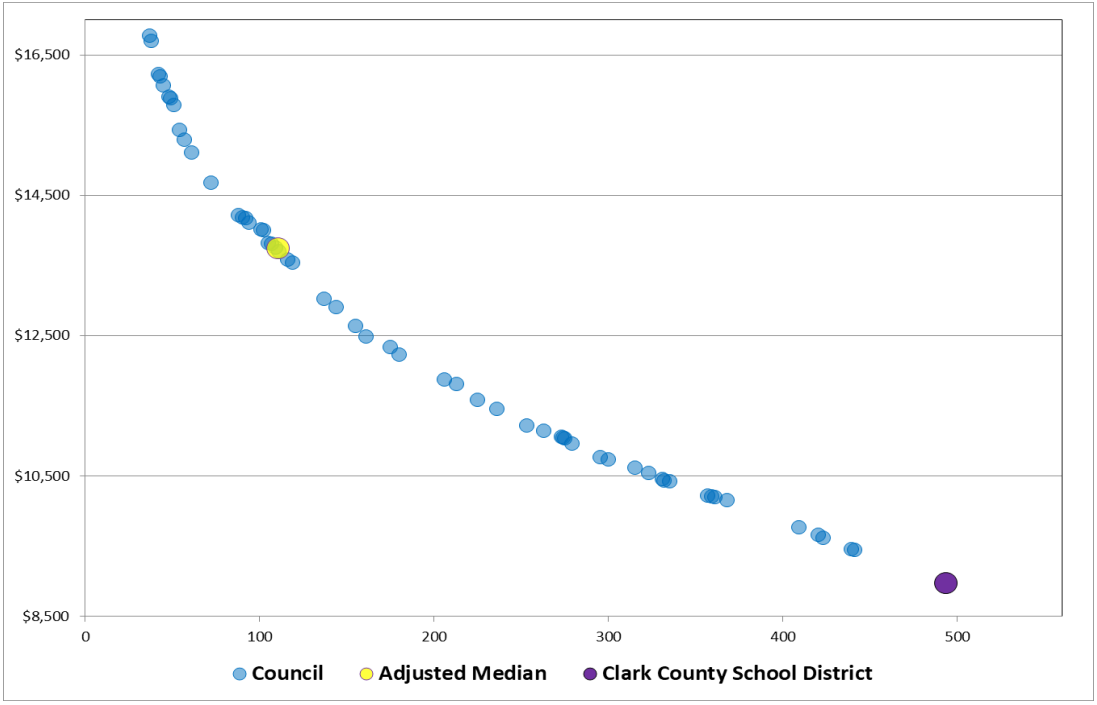
[35] Source: https://nces.ed.gov/. The NCES has an extensive array of data on every school district in the nation, including staffing levels and personnel expenditures.
[36] The team must rely on the accuracy and consistency of the data reported by school districts when making comparisons.
[37] The median of this group was calculated, and a ranking was assigned that corresponds to where that median would have ranked among the districts with membership of 15,000 students and over.
[38] This value was calculated by dividing the number of CCSD students by total district expenditures.
[39] This value was calculated by dividing the number of CCSD students by total instructional expenditures.

- CCSD school-site administration expenditure per student[40] that year was $614, compared to the Great City School median of $673 per student, which was somewhat lower than the adjusted CGCS median (see Exhibit 14);

- CCSD central office administration staff expenditure per student[41] that year was $84 compared to the Great City School median of $136 per student, which was also somewhat lower than the adjusted CGCS median (see Exhibit 15); and

- CCSD operations, business services, and other expenditures, per student were $3,470,[42] compared to the Great City School median of $6,265 per student, which was significantly lower than the adjusted CGCS median. The CCSD operations, business services, and other expenditures was the lowest of all CGCS reporting districts (see Exhibit 16).

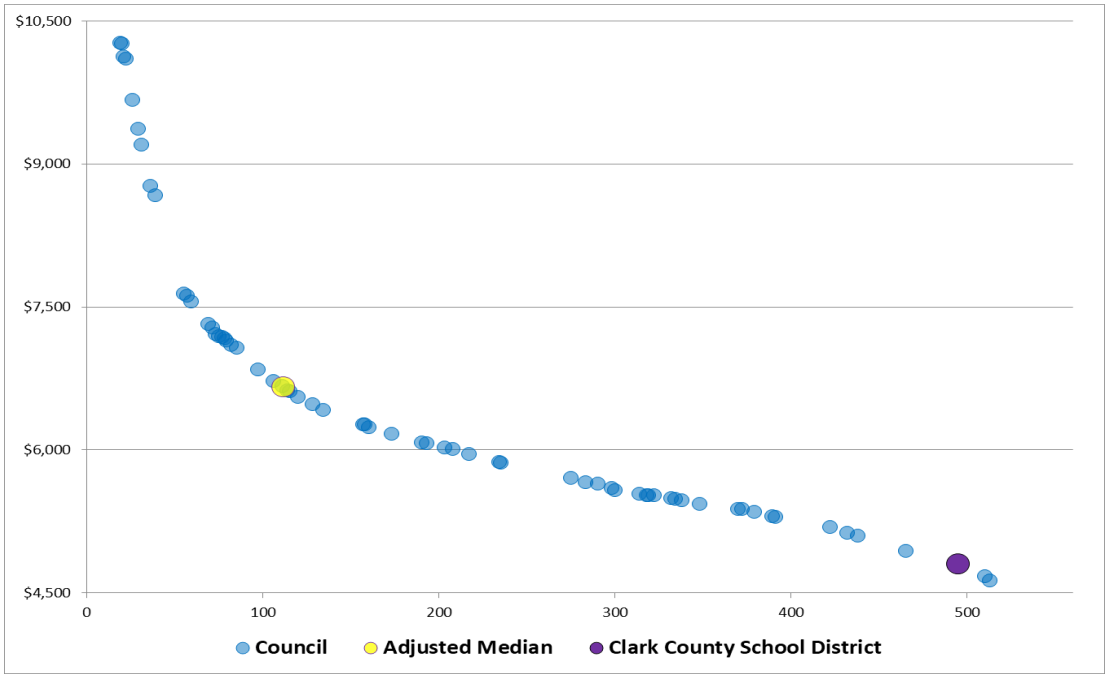
Exhibit 12. Total Expenditures per Student



Y-axis=total total expenditures per student; X-axis=ranking) in relation to all Great City School districts in the nation. Note that each blue dot represents a Great City School district. CCSD spent $8.964 per student; the adjusted median for the Great City Schools was $13,730 for total expenditures per student.

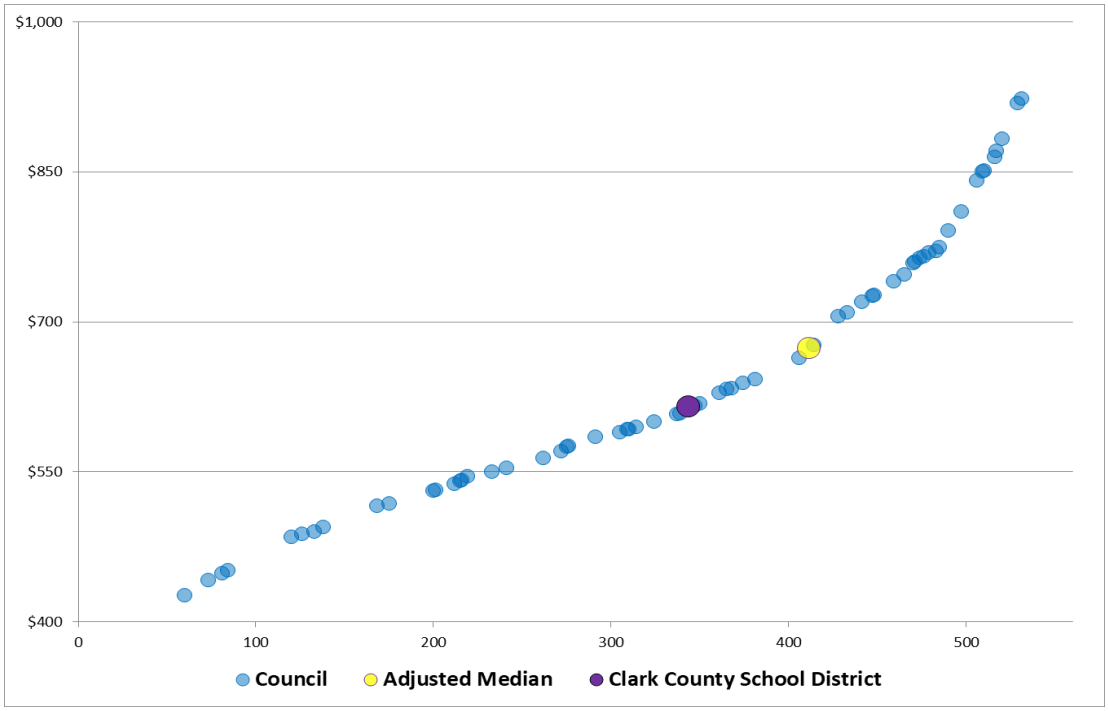
[40] This value was calculated by dividing the number of CCSD students by total school-site administrative staff expenditures. School-site-staff in this measure include principals, assistant principals, and persons who supervise school operations, assign duties to staff members, supervise and maintain the records of the school, and coordinate school instructional activities with those of the education agency, including department chairpersons.
[41] This value was calculated by dividing the number of CCSD students by the combined total central office administrative staff expenditures. Central office staff for this measure include superintendents, deputies, and assistant superintendents, and other persons with districtwide responsibilities.
[42] This value was calculated by dividing the number of CCSD students by total operations, business services and other expenditures.

Exhibit 13. Instructional Expenditures per Student



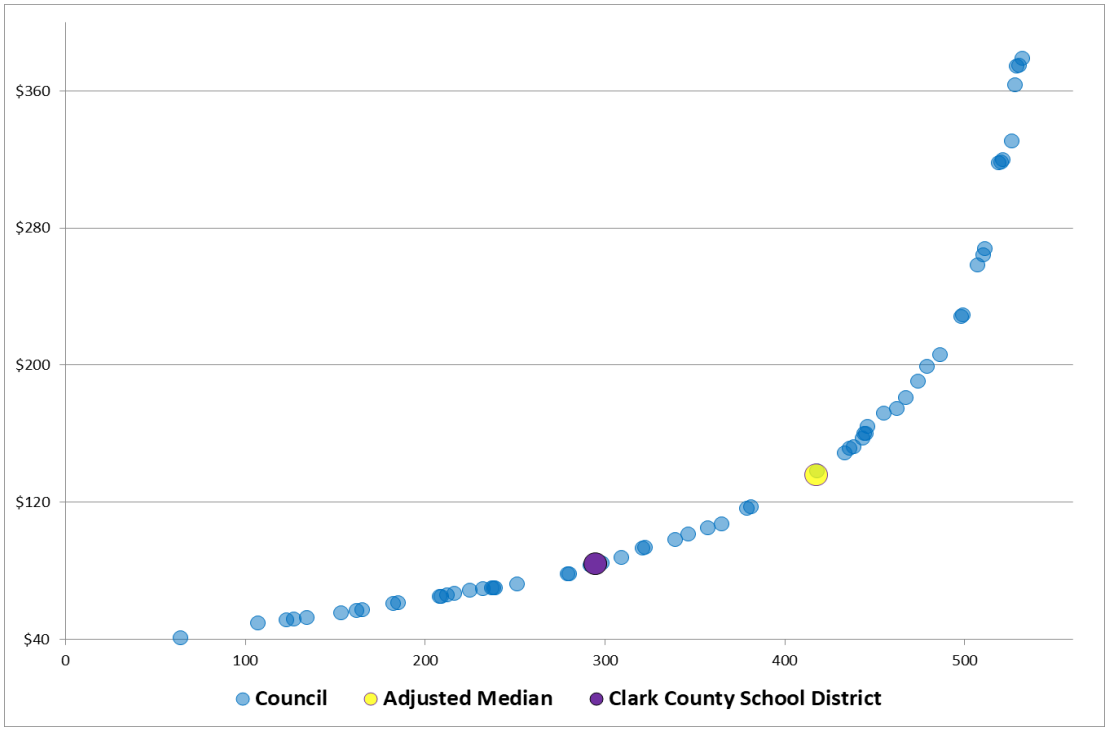
Y-axis=total instructional expenditures per student; X-axis=ranking in relation to all Great City School districts in the nation. Note that each blue dot represents a Great City School district. CCSD spent $4,796 on instructional expenditures per student; the median for the Great City Schools was $6,656 for instructional expenditures per student.

Exhibit 14. School-Site Administration Expenditures per Student



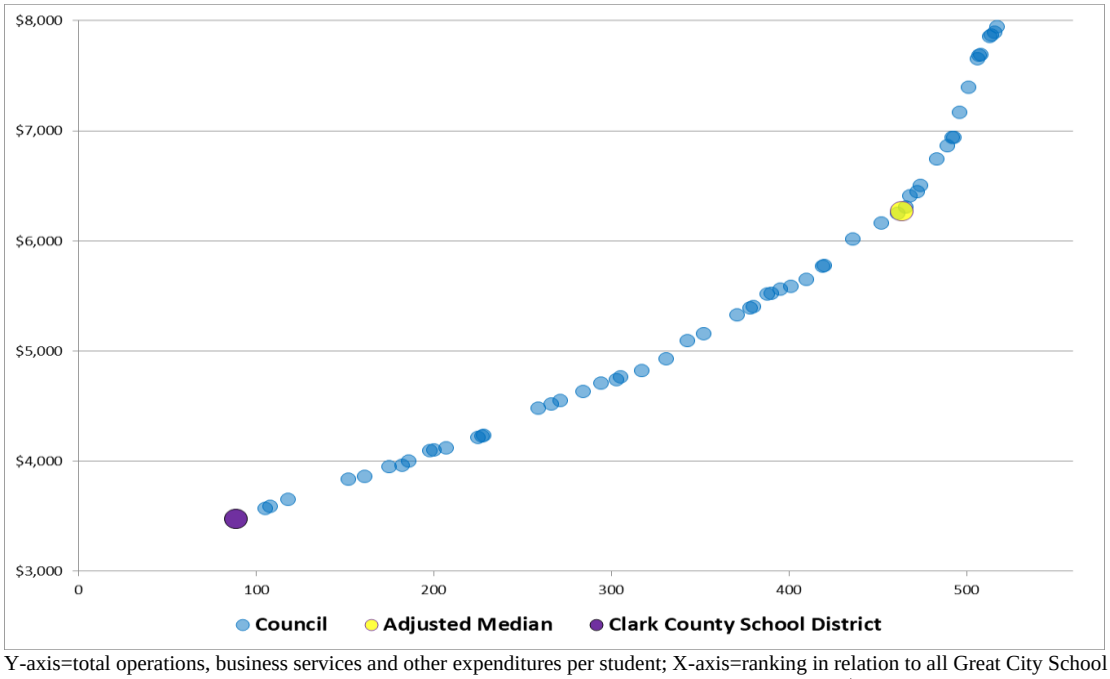
Y-axis=total school-site administration expenditures per student; X-axis=ranking in relation to all Great City School districts in the nation. Note that each blue dot represents a Great City School district. CCSD spent $614 on school administration expenditures per student; the median for the Great City Schools was $673 for school-site administration expenditures per student.

Exhibit 15. Central Office Administration Expenditures per Student



Y-axis=total central office administration expenditures per student; X-axis=ranking in relation to all Great City School districts in the nation. Note that each blue dot represents a Great City School district. CCSD spent $84 on general administration expenditures per student; the adjusted median for the Great City Schools was $136 for central office administration expenditures per student.

Exhibit 16. Operations, Business Services and Other Expenditures per Student



Y-axis=total operations, business services and other expenditures per student; X-axis=ranking in relation to all Great City School districts in the nation. Note that each blue dot represents a Great City School district. CCSD spent $3,470 on operations, business services and other expenditures per student; the adjusted median for the Great City Schools was $6,265 for operations, business services and other expenditures per student.

- Exhibit 17 below compares NCES median *total* per student expenditures, by category, with (a) school districts (LEA)[43] across the country with enrollment of at least 50,000 students,[44] (b) selected CGCS districts (Albuquerque Public Schools, Denver Public Schools, Houston Independent School District, Los Angeles Unified School District, and Miami-Dade County Public Schools) based on total enrollment and similar demographics, (c) CGCS districts, and (d) CCSD. For Exhibits 17, 18, and 19, larger instructional expenditures are generally preferred, and smaller non-instructional expenditures are preferred since more dollars are available to the classroom.

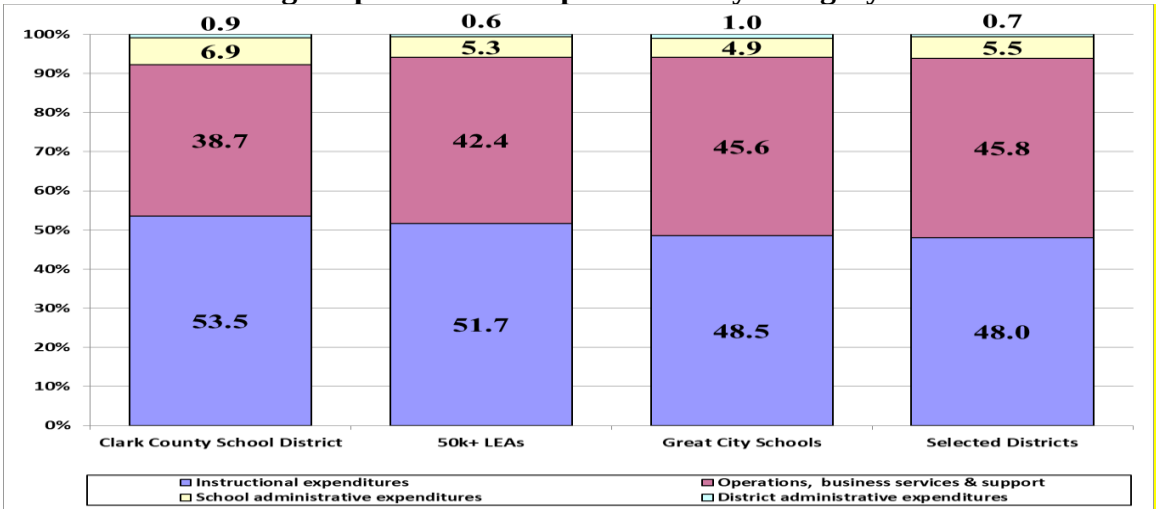
Exhibit 17. Median *Total* per Student Expenditures by Category

Median *Total* Per Student Expenditures	50k+ LEAs	Selected Districts	Great City Schools	Clark County School District
Total expenditures per pupil	$10,544	$10,882	$13,730	$8,964
Percent of total	100.0%	100.0%	100.0%	100.0%
Instructional expenditures per pupil	$5,452	$5,226	$6,656	$4,796
Percent of total	51.7%	48.0%	48.5%	53.5%
Operations, business services, and other expenditures per pupil	$4,468	$4,988	$6,265	$3,470
Percent of total	42.4%	45.8%	45.6%	38.7%
School administration expenditures per pupil	$555	$597	$673	$614
Percent of total	5.3%	5.5%	4.9%	6.9%
District administration expenditures per pupil	$69	$71	$136	$84
Percent of total	0.6%	0.7%	1.0%	0.9%

Source: NCES - Latest Financial Data Available

- Exhibit 18 below graphically illustrates the percentage of instructional expenditures, ranked highest to lowest, using data from Exhibit 17 above. CCSD's instructional expenditures were the highest at 53.5 percent.

Exhibit 18. Percentage of per Student Expenditures by Category



Source: NCES - Latest Financial Data Available

[43] Local Education Agency (LEA) is a commonly used synonym for a school district.
[44] Ninety-three districts with 50,000 or more students.

- Exhibit 19 below compares median per student *personnel only* expenditures as a share of total expenditures.

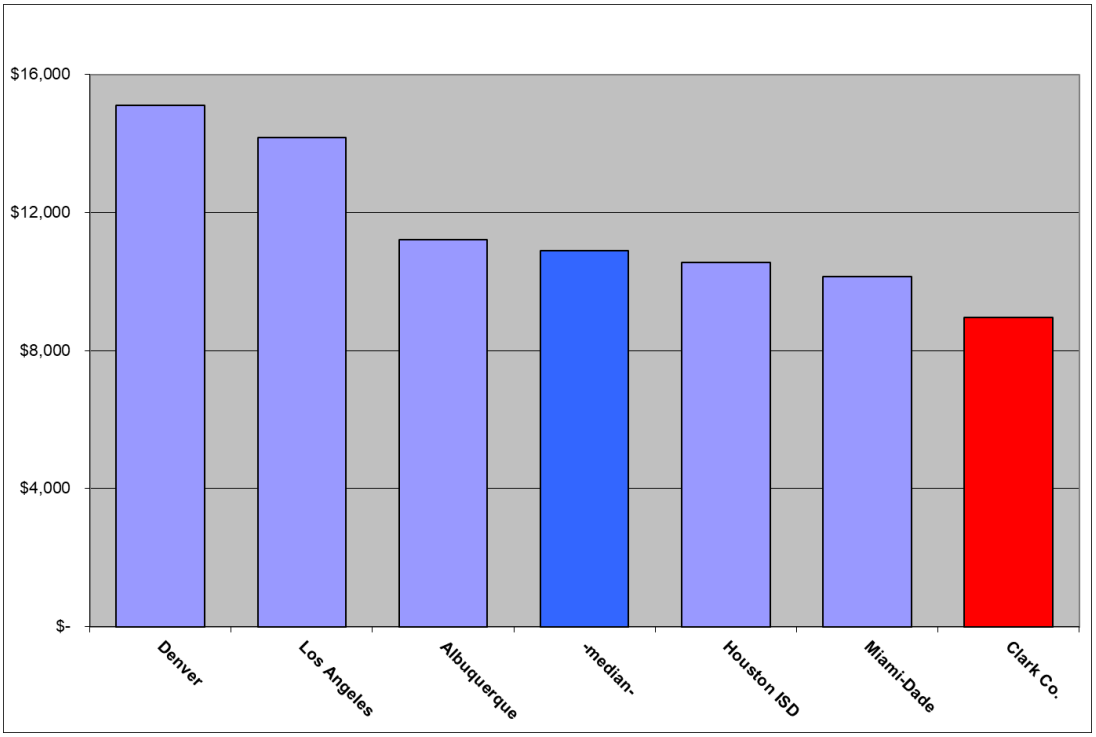
Exhibit 19. Median per Student *Personnel Only* Expenditures by Category

Median *Personnel Only* Per Student Expenditures	50k+ LEAs	Selected Districts	Great City Schools	Clark County School District
Total personnel expenditures per pupil	$7,495	$7,172	$8,947	$6,866
Percentage of total	100.00%	100.00%	100.00%	100.00%
Instructional personnel costs per pupil	$4,980	$4,605	$5,739	$4,393
Percentage of total	66.44%	64.21%	64.15%	63.98%
Operations, business services and other personnel costs per pupil	$1,940	$1,926	$2,497	$1,816
Percentage of total	25.88%	26.85%	27.91%	26.45%
School administration costs per pupil	$540	$603	$628	$608
Percentage of total	7.21%	8.41%	7.02%	8.85%
District administration costs per pupil	$35	$38	$83	$50
Percentage of total	0.47%	0.53%	0.92%	0.72%

Source: NCES - Latest Financial Data Available

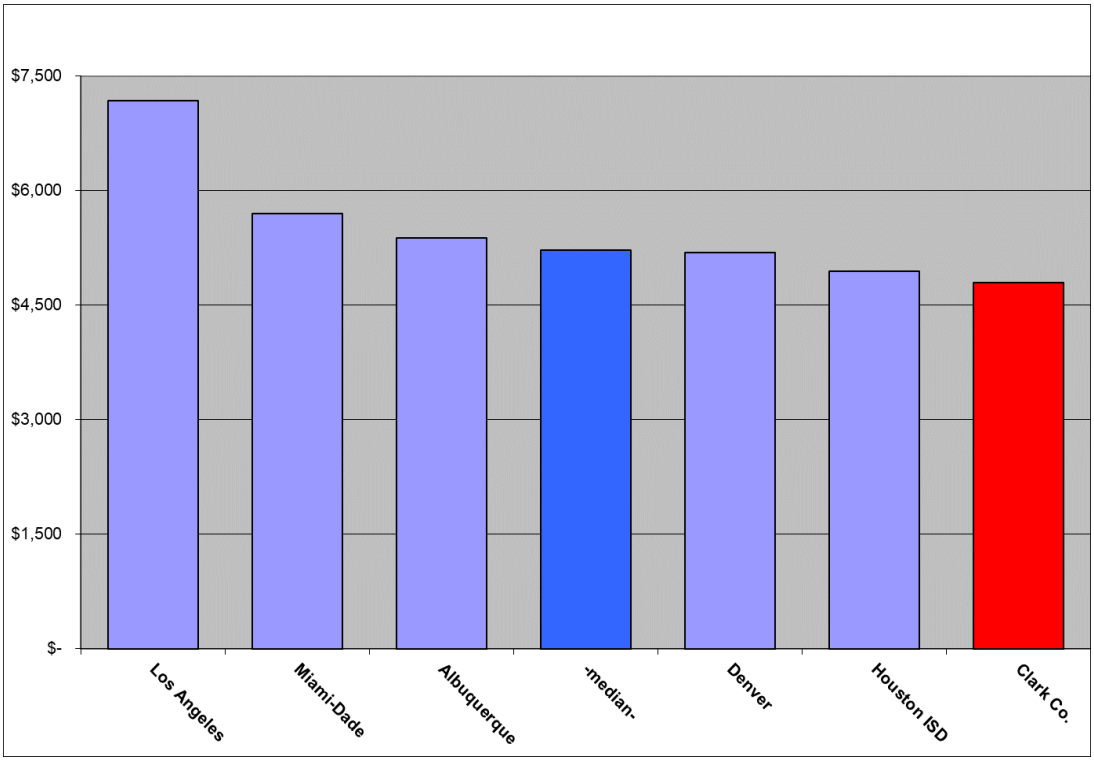
- Exhibits 20-24 below illustrate expenditures by category, comparing CCSD with the selected districts referenced above.

Exhibit 20. Total Expenditures per Student Compared to Selected Cities



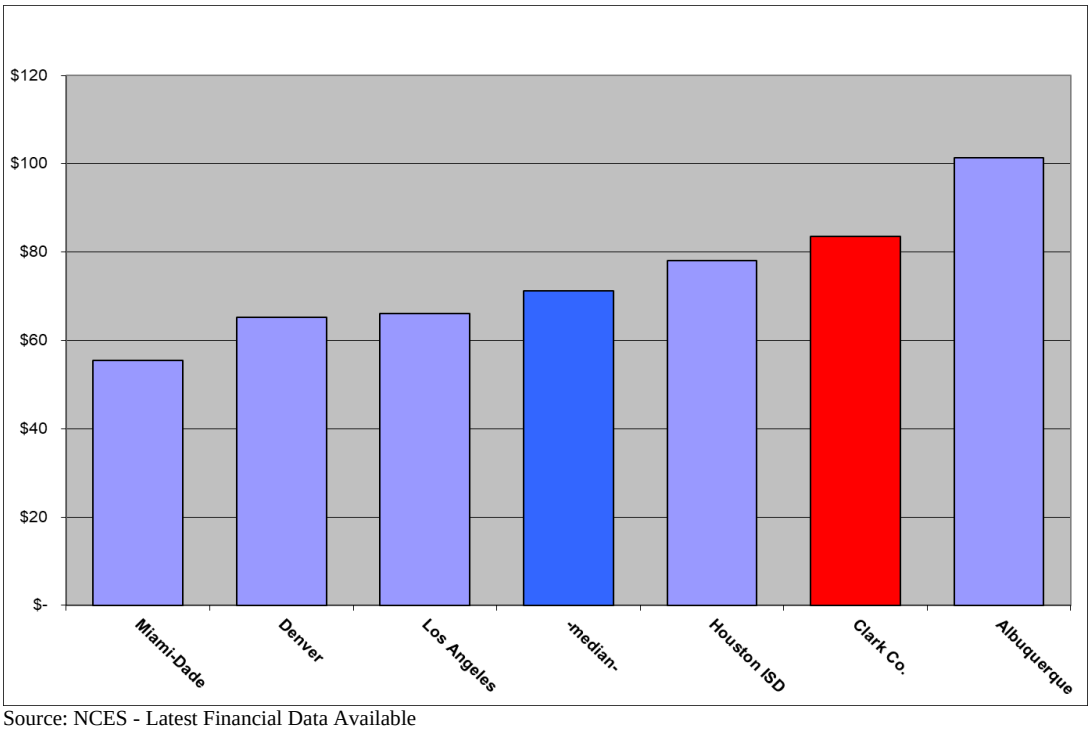
Source: NCES - Latest Financial Data Available

Exhibit 21. Instructional Expenditures per Student Compared to Selected Cities



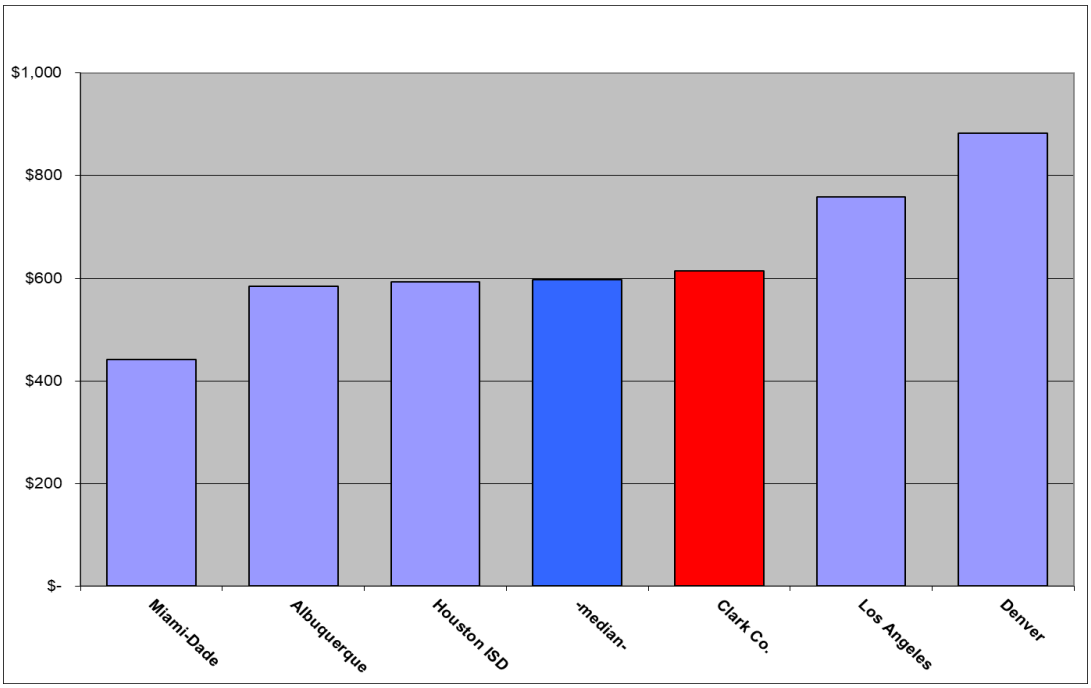
Source: NCES - Latest Financial Data Available

Exhibit 22. Central Office Administration Expenditures per Student Compared to Selected Cities



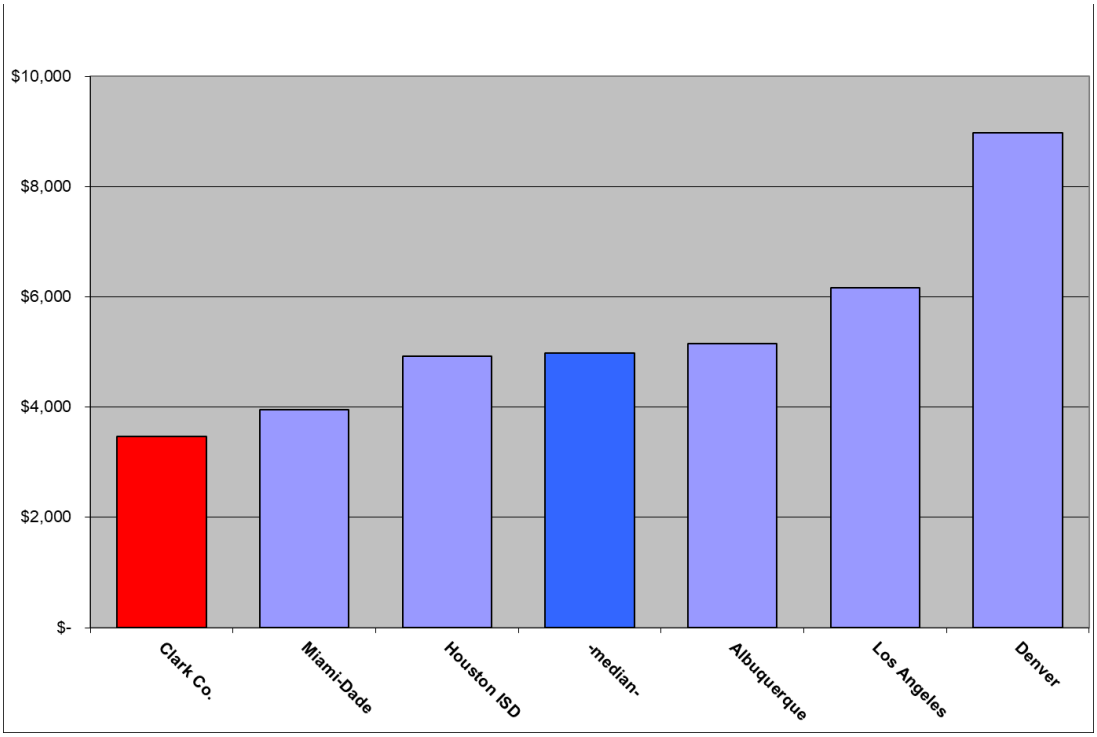
Source: NCES - Latest Financial Data Available

Exhibit 23. School-Site Administration Expenditures per Student Compared to Selected Cities



Source: NCES - Latest Financial Data Available

Exhibit 24. Operations, Business Services, and Other Expenditures per Student Compared to Selected Cities



Source: NCES - Latest Financial Data Available

Key Performance Indicators

- Exhibits 25-27 below compare CCSD self-reported operations data[45] with CGCS national median scores for its member districts.[46] The exhibits also note whether CCSD scored in the best or worst quartile among all CGCS districts reporting data.[47] Over 500 performance indicators were included in the current survey.

Exhibit 25. CGCS Transportation KPI's

Key Performance Indicator **Transportation**	Clark County School District	CGCS National Median	Note
Accidents - Miles Between Accidents	40,625	39,510	
Accidents - Miles Between Preventable Accidents	72,562	76,087	
Bus Equipment - AVL/GPS Links to Routing Software	100.00%	92.67%	
Bus Equipment - GPS Tracking	100.00%	100.00%	
Bus Equipment - Rider Harnesses, Lap-and-Shoulder	68.59%	11.72%	
Bus Equipment Video Cameras	76.13%	79.05%	
Bus Fleet - Alternatively-Fueled Buses	100%	16.06%	**Best Quartile**
Bus Fleet - Average Age of Fleet	7.50	8.10	
Bus Fleet - Maintenance Hours Per Bus	4.88	56.89	
Bus Fleet - Percent District-Operated	100%	37.66%	
Bus Fleet- Daily Buses as Percent of Total Buses	82.00%	85.00%	
Bus Fleet Inservice Daily	92.36%	97.78%	
Bus Inspection - Percent Passed on First Try	73.28%	88.19%	
Bus Usage - Daily Runs Per Bus	5.11	4.11	
Bus Usage - Daily Seat Utilization	1.62	1.18	
Bus Usage - Life Miles per Deadhead Mile	0.84	1.81	
Bus Usage - Mile Per Bus	13,465.90	12,657.90	
Cost Per Bus	$68,318.00	$60,272.00	
Cost per Mile Operated	$5.07	$5.07	
Cost per Rider	$901.00	$1,075.00	
Cost per Rider (Yellow Bus Only)	$906.63	$1,094.40	
Daily Ride Time - General Education	22 min	34 min	
Daily Ride Time - SWD Students	38 min	41 min	
Daily Ride Time, Maximum Allowed - General Education	90 min	60 min	
Daily Ride Time, Maximum Allowed - SWD Students	60 min	62.50 min	
Fuel Cost as Percent of Retail - Bio-Diesel	63.78%	79.14%	
Fuel Cost as Percent of Retail - Gasoline	89.90%	84.90%	**Worst Quartile**
Fuel Cost as Percent of Retail - Propane	89.44%	67.4%	
On-Time Performance (Corrected)	94.00%	99.78%	**Worst Quartile**
Participation Rate - Alternative Transit	0.34%	1.61%	
Participation Rate - Any Transportation Services	42.32%	46.65%	
Participation Rate - Yellow Bus Services	41.98%	44.54%	
Personnel - Buses per Mechanic	21.55	23.55	
Personnel - Drivers per Supervisor	15.97	42.35	
Personnel - Drivers per Trainer	81.08	82.73	
Personnel - Driver Turnover Rate	11.61%	14.23%	
Personnel - Drivers per Bus	0.635	0.771	
Personnel - Routes per Planner	54.33	73.63	
Public Transit - Pass/Token Cost as Percent of Retail	50.00%	50.56%	
Student With Disabilities - Percent of Ridership	8.90%	6.69%	
Student With Disabilities - Students on Dedicated SWD Buses	93.73%	91.87%	
Student With Disabilities - Student with Neighborhood Pickup	0.812%	9.670%	
Turn Time to Place New Students - General Education	1	5	
Turn Time to Place New Students - SWD Students	5	5	

Source: CGCS KPI Project

[45] These exhibits include only the departments that were part of this review.
[46] Source: 2016-2017 CGCS *Managing for Results - KPI Report*, published by the Council of the Great City Schools, October 2018.
[47] Not all KPIs have associated quartile rankings.

Exhibit 26. CGCS Facilities (Maintenance and Custodial Operations) KPI's

Key Performance Indicator **Maintenance and Operations**	Clark County School District	CGCS National Median	Note
Building Square Footage by Type - Percent Modular	0.1138%	0.5493%	
Building Square Footage by Type - Percent Portable	5.30%	1.97%	
Building Square Footage by Type - Percent Site-Built	99.14%	98.21%	
Building Square Footage by Type - Percent Academic	99.49%	98.96%	
Building Square Footage by Usage - Percent Non-Academic	5.06%	5.06%	
Building Square Footage by Usage - Percent Vacant	0.274%	1.830%	
Custodial Supply Cost per Square Foot	$0.01	$0.11	Best Quartile
Custodial Work - Cost per Square Foot	$2.25	$1.59	Worst Quartile
Custodial Work - Cost per Student	$240.00	$277.00	
Custodial Workload	23,350	26,381	
Custodial Work - Staff Ratio - Field Workers per Office Staff	161	65.25	
Custodial Work - Staff Ratio - Non-Exempt per Exempt Field Staff	361.25	168.00	
Green Buildings - Buildings Green Certified	1.13%	1.17%	
Green Buildings - Buildings Green Certified or Equivalent	6.00%	2.00%	
Gounds Work - Cost per Acre	$5,254.61	$1,272.95	
Gounds Work - Cost per Student	$30.90	$29.13	
Gounds Work - Staff Ratio - Field Workers per Office Staff	18	13	
Gounds Work - Staff Ratio - Non-Exempt per Exempt Field Staff	0.042	14	
M&O Cost per Student	$1,763.0	$963.0	
M&O Costs Ratio to District Operating Budget	20.70%	7.90%	
M&O Staff - Field Staff as Percent of All Staff	98.72%	94.45%	
M&O Staff - Non-Exempt Workers as Percent of Field Staff	92.65%	97.17%	
Major Maintenance - Cost per Student	$24.00	$88.00	
Major Maintenance - Delivered Construction Costs as %t of Total	87.00%	88.70%	
Major Maintenance - Design to Construction Cost Ratio	14.90%	6.70%	
New Construction - Cost per Student	$1,091.00	$149.00	
New Construction - Delivered Construction Costs as % of Total Costs	91.40%	93.40%	
New Construction - Design to Construction Cost Ratio	9.00%	6.80%	
New Construction - Supervisor/Support Staff Costs as % of Total	0.3372%	1.75%	
Recycling - Percent of Total Material Stream	42.90%	23.40%	Best Quartile
Renovations - Cost per Student	$230.00	$262.00	
Renovations - Delivered Construction Costs as Percent of Total Costs	87.80%	90.90%	
Renovations - Design to Construction Cost Ratio	12.00%	8.00%	
Renovations - Supervisor/Support Staff Costs as Percent of Total	1.66%	3.13%	
Routine Maintenance - Cost per Square Foot	$1.39	$1.18	
Routine Maintenance - Cost per Student	$147.54	$219.11	
Routine Maintenance - Cost per Work Order	$766.00	$470.00	Worst Quartile
Routine Maintenance - Ratio of Field Workers to Office Staff	46.67	9.64	
Utility Costs - Cost per Square Foot	$1.97	$1.23	Worst Quartile
Utility Costs - Electricity Cost per Square Foot	$1.27	$1.03	
Utility Costs - Heating Fuel Cost per Square Foot	$0.08	$0.15	
Utility Costs - Sewer Cost per Square Foot	$0.19	$0.10	
Utility Costs - Water Cost per Square Foot	$0.44	$0.09	
Utility Usage - Electricity Usage per Square Foot (KWh)	14.30	9.20	Worst Quartile
Utility Usage - Heating Fuel Usage per Square Foot (KBTU)	16.70	15.30	
Utility Usage - Water (Non-Irrigation) Usage per Square Foot (Gal.)	92.70	13.20	Worst Quartile
Utility Usage - Water Usage for Irrigation	43.82%	14.53%	
Work Order Cancel/Void Rate	13.38%	1.60%	
Work Order Completion Rate	86.62%	98.40%	
Work Order Completion Time (Days)	1	16	Best Quartile

Source: CGCS KPI Project

Exhibit 27. CGCS Procurement KPI's

Key Performance Indicator **Procurement**	Clark County School District	CGCS National Median	Note
Competitive Procurements Ratio	77.20%	63.40%	
Completion Eligible Procurement - Percent of Total Spending	77.43%	73.53%	
Completion Eligible Procurement - Percent Sole-Source	0.285%	2.45%	
Construction - Percent of Purchasing	51.81%	16.65%	
Cooperative Purchasing Ratio	10.00%	9.50%	
Cooperative Purchasing Ratio - Excluding P-Cards	11.10%	6.40%	
M/WBE Vendor Utilization	8.85%	5.16%	
PALT for Informal Solicitations	4	7	
PALT for Invitations for Bids	120	70	Worst Quartile
PALT for Invitations for Bids - (A) Days to Prepare	21	18	
PALT for Invitations for Bids - (B) Days of Advertising and Open Biddin	32	24.7	
PALT for Invitations for Bids - (C) Days to Issue After Close	67	30.8	
PALT for Request for Proposals	132	100	Worst Quartile
PALT for Request for Proposals - (A) Days to Prepare	16	20.5	
PALT for Request for Proposals - (B) Days Proposals Accepted	43	25	
PALT for Request for Proposals - (C) Days to Issue After Close	73	55	
P-Card Average Transaction Amount	$263.47	$244.29	
P-Card Purchasing Ratio	10.40%	3.10%	
P-Card Single Transaction Limit	$1,952.17	$1,584.35	
Procurement Cost per Purchase Order	$57.41	$51.91	
Procurement Costs per $100K Revenue	$124.00	$97.00	Worst Quartile
Procurement Costs per $100K Spend	$434.13	$341.04	
Procurement Costs Ratio - Outsourced Services	1.06%	3.39%	
Procurement Costs Ratio - Personnel	97.09%	96.22%	
Procurement Savings - Percent Through Informal Solicitations	5.00%	5.68%	
Procurement Savings - Percent Through Invitations for Bids	65.00%	36.34%	
Procurement Savings - Percent Through Requests for Proposals	30.00%	58.41%	
Procurement Savings Ratio	6.90%	3.04%	Best Quartile
Procurement Staff - Cost per FTE	$74,844.10	$77,926.35	
Procurement Staff - District FTEs per Procurement FTE	694.24	940.08	
Procurement Staff with Professional Certificate	27.90%	20.00%	
Procurement Staffing Ratio - Supervisors and Managers	16.28%	15.83%	
Procurement Staffing Ratio - Support and Clerical	16.28%	26.37%	
Procurement Staffing Ratio - Professional Staff	67.44%	53.45%	
Strategic Sourcing Ratio	84.10%	30.70%	Best Quartile
Threshold for Formal Proposal	$48,804.30	$48,348.50	
Threshold for Formal Sealed Bid	$48,804.30	$49,019.60	
Threshold for School Board Approval	$48,804.30	$79,197.50	
Warehouse Number of Unique Items	4,438	4,581	
Warehouse Number of Unique Items - Facility Maintenance	1,318	2,317	
Warehouse Number of Unique Items - Food Services	481	376	
Warehouse Number of Unique Items - Transportation Maintenance	2,659	2,967	
Warehouse Operating Expense Ratio	8.50%	8.50%	
Warehouse Operating Expense Ratio - Facility Maintenance	46.59%	35.15%	
Warehouse Operating Expense Ratio - Food Services	7.82%	10.87%	
Warehouse Operating Expense Ratio - Transportation Maintenance	20.01%	18.96%	
Warehouse Stock Turn Ratio	7.70	3.90	Best Quartile
Warehouse Stock Turn Ratio - Facility Maintenance	0.974	1.498	
Warehouse Stock Turn Ratio - Food Services	9.903	5.741	
Warehouse Stock Turn Ratio - Transportation Maintenance	1.517	3.647	

Source: CGCS KPI Project

Recommendations

The CGCS Strategic Support Team developed the following recommendations[48] to improve the business operations of the Clark County School District.

1. Accelerate the recruitment and onboarding of proven executives and managers to fill all key vacancies. As staff positions are filled, department leaders reporting to the COO should establish compelling department visions and identify and articulate department priorities that support the School Board's Core Values. These priorities should include--

    a. The collaborative development of department objectives that articulate and embrace a clear direction aligned with the school board and the Superintendent's new strategic plan (when released) and goals;

    b. Setting appropriate benchmarks, performance plans, targets, and expectations that ensure empowerment and accountability across teams and departments;

    c. The development of realistic five-year department strategic plans that are focused on *customer needs*. The plans--to be developed with the participation of staff and other stakeholders--should include quantifiable goals, performance measures, accountabilities, targets, metrics, and timelines. The plan should be refreshed annually;

    d. The transition to a data-driven organization and culture that relies upon fact-based and analysis-centric justifications for decisions, including the use of modern automated systems, tools, and techniques such as --

        i. Defined performance measures, including KPIs and industry best practices and standards for all primary functions of each department, including manager and supervisor accountability for achieving these measures;

        ii. Cost-benefit analysis, risk assessment, and business-case justifications for proposed initiatives, organizational changes, and significant procurements to continually move departments forward; and

        iii. Root-cause analyses and corrective action plans to address operational issues.

    e. The design of strategies to reduce and ultimately eliminate any *Central Services Survey* results that scored "red" and any KPI results that placed CCSD in the "worst quartile" range.

2. Develop business cases that incorporate accurate costs, benchmarks, goals, cost-benefit analysis, return on investment (ROI) analysis, risk assessments, total cost of ownership (TCO) analyses, reasonable implementation timelines, and other appropriate analytical tools, for, at a minimum, the following activities --

[48] Recommendations are not listed in any specific order or priority.

a. New initiatives, such as the introduction of new bus types into the fleet, changes in business processes, new enterprise or department-level software applications, and other significant procurements;

b. Determining the appropriateness of using contracted services to fill staffing needs during high vacancy periods, especially in trades and transportation;

c. Examining the feasibility and cost savings potential of introducing vertical, multi-story construction for new schools to reduce property purchase and footprint costs; (The analyses should be paired with consideration of grade-level appropriateness and community and parent wishes.)

d. Reviewing *all* maintenance functions and determining what work can be performed more cost effectively by district staff vs. the cost of contracting or purchasing for the same services or products from outside vendors;

e. Determining the appropriateness and cost effectiveness of using contracted services for calls for service at school locations greater than, for example, one-hour travel time from the nearest district service facility; and

f. Transitioning to Leadership in Energy and Environment Design (LEED).

3. Prioritize the study of establishing a new Enterprise Program Management Office (located in the Office of the Superintendent) that would --

   a. Create an enterprise-wide program management strategy and governance structure to coordinate strategic priorities and resolve conflicts;

   b. Develop controls to ensure the district's leadership team has complete, accurate, and timely information for decision making;

   c. Implement methodologies and controls to ensure strategies, directions, and instructions from management are coherent and carried out;

   d. Ensure new initiatives are fully coordinated with all impacted departments at the planning table; and

   e. Coordinate cross-functional teams organized around district priorities.

4. Develop or hire leaders who will lead by example in championing knowledge sharing and collaboration. Ensure regular staff meetings take place at each level with specific agendas, documented minutes of discussions, decisions, and follow-up activities, so employees know--

   a. The district's and department's goals and objectives and how they will be achieved;

   b. That interdepartmental collaboration is taking place with all appropriate departments and stakeholders at the table;

c. How personnel will be held accountable and evaluated using performance-monitoring metrics;

d. Why changes are being made that may impact the team along with expected outcomes;

e. That managers and supervisors are held responsible for ensuring that information and feedback is disseminated up-and-down and side-to-side within and between departments; and

f. That employee feedback and suggestions are welcomed and considered, so team members know there is an ongoing departmental process-improvement program to encourage innovation.

5. Invest in implementing industry best practices into the facilities division by--

a. Developing and regularly updating a facilities condition assessment,[49] a current long-term facilities master plan, and a facilities condition index;

b. Transforming the culture of the department to make preventive maintenance a primary focus of the department's maintenance efforts and delivering a predictive and preventive maintenance approach to ensure that critical equipment and systems are maintained to maximize lifetime effectiveness;

c. Executing change management planning that defines activities and roles for all initiatives;

d. Prioritizing, quantifying, and costing existing deferred maintenance projects to assist the department and the district in securing needed funds; and

e. Creating open lines of communication between --

i. The district team handling construction warranty and the construction management team to improve future designs, lessons learned that can be used as input for contractor evaluations;

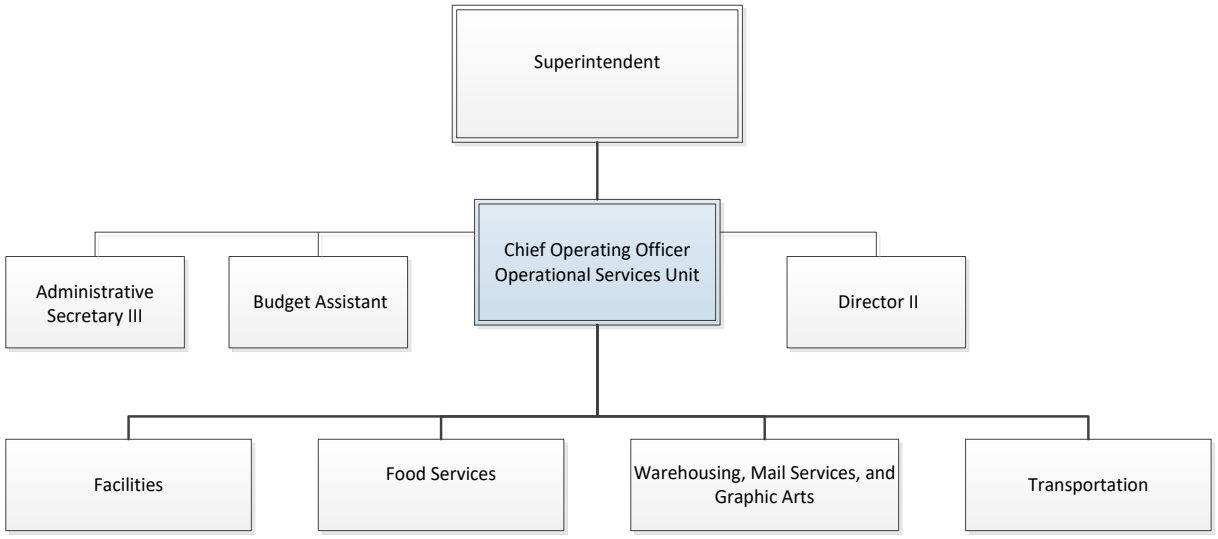
ii. The district construction planning team(s) and impacted local government jurisdictional departments at the beginning of the planning phase, to safeguard against during or after construction "surprises;" and

iii. The Facilities Division and the Office of Communication and Community Engagement with weekly or bi-weekly status meetings to identify what projects may require community outreach.

[49] Facilities Condition Assessment (FCA) provides objective, quantifiable facilities data, resulting in a Facilities Condition Index (FCI) that allows the district to 1) objectively prioritize and rank facilities projects according to need; 2) plan and schedule projects according to an objectively ranked priority; and 3) promulgate such rankings, plans and schedules to district stakeholders and the community at large.

6. Reorganize the Office of the Chief Operating Officer to establish appropriate separations of duties and responsibilities, to optimize efficiency, effectiveness, improve internal communication, eliminate silos, and promote clear lines of authority and accountability. Exhibit 28 below illustrates a potential high-level functional reorganization. Under this organization, the Chief Operating Officer's span of control is reduced, permitting increased departmental oversight, goal setting, and focus on streamlining systems and workflows throughout the organization. Based on current best practices, the core functions of the office should be reorganized or changed as follows --

Exhibit 28. Office of the Chief Operating Officer Functional Reorganization



Source: CGCS Review Team

a. The Facilities, Food Services, and Transportation Departments should continue to report as line functions to the COO;

b. A separate Warehousing, Mail Services, and Graphic Arts Department should be created and continue to report as a line function to the COO;

c. The current Purchasing function should be transferred to the Office of the Chief Financial Officer;

d. The current Risk and Environmental Services function should be transferred to an enterprise-level function in the Office of the Superintendent or the Office of the Chief Financial Officer;

e. The current Technology and Information Systems Services Department should be transferred to the Office of the Superintendent, reporting directly to the Superintendent;

f. The current Vegas PBS function should be transferred to the more appropriate Office of Communications and Community Engagement;

g. Transfer the Contracts, Procurement and Compliance Unit, currently positioned in the Facilities Division, to the Purchasing Department to better leverage the district's procurement and purchasing expertise. The Purchasing Director (or designee) should be included in all construction procurement strategic planning, and he/she should be responsible and oversee contracting functions, including sourcing strategies, specification development, bid/proposal evaluation, terms & conditions, working with the Office of the General Counsel on relevant issues, supplier relations, managing contracts, life cycle costing, and negotiation in the contracting process; and

h. As a result of these changes, ensure individuals placed in leadership positions in the reorganization have the appropriate skills, expertise, experience, and ongoing training to be successful. Changes to job descriptions to support the reorganization may be necessary.

7. Partner with the Office of Human Resources, and together --

   a. Review and update job titles and job descriptions to provide a realistic portrayal of current duties, responsibilities, expectations, and reporting lines. Redistribute revised job descriptions to impacted employees to ensure accountability;

   b. Monitor turnover rates, establish exit interview protocols for employees who voluntarily separate from CCSD, and identify and track causes of leaving for opportunities to make or recommend changes in policy; and

   c. Invite the Office of Communications and Community Engagement to plan and staff ongoing recruitment opportunities and by leveraging mass communication and social media approaches so the district can successfully fill critical vacancies.

8. Develop--with a sense of urgency--a district-wide energy conservation program. Incentivize schools to save energy and require the facilities division to aggressively pursue funding for sustainability and smart technology projects. Further, provide schools with web-based real-time energy usage and summary level energy reports for students, staff, and parents to use to provide timely feedback on how their school is doing concerning their energy goals for the year.

9. Establish a district standardized methodology for the design and execution of organizational charts. Require consistency of data provided, how data are presented – especially position titles and position levels – and ensure that all positions completely align with any future position control system.

10. Evaluate the appropriateness of including additional operations-related survey items to the annual *Central Services Survey*. Consider including survey items that reflect student, parent, and teacher input on food, transportation, and other services deemed appropriate. Use this input to establish future priorities and training opportunities. Throughout the year, utilize customer focus groups to identify and act on areas of concern. Additionally, develop a web-based customer satisfaction report where school principals can provide the Chief Operating Officer with a monthly assessment of services received.

11. Examine all department practices and procedures with a *customer service* focus. Evaluate and revise services as necessary with the goal of streamlining and simplifying operations and incorporating best practices. Disseminate to all department staff or post on the district's intranet the documented administrative processes and procedures for all functions.

12. Initiate a comprehensive staffing study of all departments to ensure all functions are staffed appropriately with the goal of mirroring industry norms identified in this letter. Evaluate current organizational structures and workflows to determine if staff could be repurposed or processes reengineered to achieve operational efficiencies and effectiveness. Identify and reduce organizational redundancies. Review and eliminate all one-to-one reporting relationships to flatten organizational structures; evaluate spans of control for appropriateness; and take corrective action where needed.

13. Invest in creating staff development programs that provide opportunities for new and current employees at all levels to enhance their skills, create capacity, increase promotability, learn industry best practices, participate in cross-functional training – especially across maintenance trades, participate in professional organizations, and visit peer districts to examine different approaches to solving similar challenges.

14. Conduct a comprehensive review of district vulnerabilities, operational weaknesses, lack of internal controls, lack of due diligence, or lack of best practices being followed, and confirm that corrective action on the following concerns identified in this management letter is taking place by--

    a. Establishing or confirming that a business continuity/disaster recovery and redundancy plans are in place and continually tested to minimize the risk of a catastrophic data loss and ensure the protection, integrity, and availability of critical district systems;

    b. Implementing on-going scenario-based tabletop emergency management drills and designing and continually testing a coordinated interdepartmental emergency response plan;

    c. Developing a robust contractor and vendor evaluation system that includes language linking poor evaluations to not participating in future bid solicitations;

    d. Mitigating the effects of Assembly Bill 469 to ensure the district's interests and exposure, as identified in this management letter, are protected to the greatest extent possible;

    e. Removing potential conflicts by ensuring the *same* few district staff are not assigned to committees that make procurement decisions, and that rotating independent third parties are included on these committees;

    f. Separating the management of bond funds and the management of construction work by moving bond-fund oversight (and staff) to the Office of the Chief Financial Officer;

    g. Requiring all non-standard contracts be reviewed and approved by the Office of the General Counsel before award; and

h. Calling for third party independent cost estimates be used to validate construction bids, particularly when budgets are substantially exceeded.

15. Develop a structured and transparent attendance boundary process. Adjust boundaries on a regular basis to balance the utilization of schools and maximize capacities. Establish an interdepartmental committee of appropriate stakeholders and parents to review school boundaries and develop boundary change recommendations that include walk-path safety and school diversity while reducing the need for school bus transportation.

16. Focus on opportunities for revenue generation, including, but not limited to --

    a. Leveraging E-Rate technology purchases;

    b. Reviewing the existing P-Card contract and taking appropriate action to ensure that the district is maximizing all potential P-Card rebates;

    c. Taking full advantage of P-Card utilization, especially low-value purchases, to significantly improve cycle times for schools, to increase rebate opportunities, and to decrease procurement transaction costs;[50] and

    d. Reviewing and strengthening the district's ability to maximize reimbursements under Medicaid for transporting eligible children.

17. Require collaboration with staff members, both internal and cross-functional, when discussions or decisions are being made that may affect their operation. Further, solicit input, in advance, from any department that may be impacted by any proposed collective bargaining language change or new proposal. Proactively seek, from department heads and others as appropriate, suggested changes to existing contract language (such as managers and supervisors not being in the same bargaining unit as those they supervise and evaluate) at reopeners or contract renewal cycles.

18. Strengthen or expand operational efficiency in the following key areas --

    a. Review the current "use-it or lose-*most*-of-it" illness practice to identify alternatives that can be negotiated and benefit both the district and the employee;

    b. Require food buyer participation in menu planning to better forecast needs and enjoy potential better pricing;

[50] Maximizing P-Card usage allows procurement professionals to concentrate efforts on the more complex purchases, significantly reduces accounts payable workload, and provides schools a shorter cycle time for purchases. Increased P-Card spending can provide higher rebate revenues, which in turn can pay for the management of the program. There are trade-offs, however. The decentralized nature of these purchases could have an impact on lost opportunity for savings (via bulk purchases) and requires diligent oversight to prevent inappropriate use and spend analysis to identify contract savings opportunities. (Source: CGCS *Managing for Results,* 2017.)

c. Meet with the Office of the General Counsel to verify the correct interpretation of NRS 332 and make procedural changes, if necessary, to bring the district into compliance;

d. Leverage the GPS technology already on all school buses to accurately capture on-time performance and to identify and correct route delays; and

e. Identify and analyze the reasons why buses are not passing state inspections. Develop a refresher bus driver bus inspection training program and require all drivers sign in attendance and be held accountable. Increase bus supervisor presence during driver pre and post-trip bus inspections and hold supervisors accountable for buses they are responsible for.

19. Develop succession planning and cross-training within all departments to ensure knowledge transfer and the orderly transition of responsibilities. Avoid creating organizational dependence on any individual by designing workflow sharing and cross-training to ensure continuity of service in the event of employee unavailability or absenteeism.

20. Reconcile any inconsistencies between how department heads rated themselves on the OPPAGA survey and the findings generated from staff interviews.

ATTACHMENT A. STRATEGIC SUPPORT TEAM

Dr. Robert Carlson

Dr. Robert Carlson is Director of Management Services for the Council of the Great City Schools. In that capacity, he provides Strategic Support Teams and manages operational reviews for superintendents and senior managers; convenes annual meetings of Chief Financial Officers, Chief Operating Officers, Transportation Directors, and Chief Information Officers and Technology Directors; fields hundreds of requests for management information; and has developed and maintains a Web-based management library. Prior to joining the Council, Dr. Carlson was an executive assistant in the Office of the Superintendent of the District of Columbia Public Schools. He holds doctoral, and a master's degree in administration from The Catholic University of America; a B.A. degree in political science from Ohio Wesleyan University; and has done advanced graduate work in political science at Syracuse University and the State Universities of New York.

David M. Palmer

David Palmer, Deputy Director (retired), Los Angeles Unified School District (LAUSD), is a forty-year veteran of school business operations administration. Mr. Palmer's executive responsibilities included the management and oversight of operations, strategic planning and execution, budget development and oversight, and contract administration. Mr. Palmer oversaw the design and implementation of performance standards, benchmarks and accountabilities for staff and advised the Council of Great City Schools on the *Key Performance Indicator* project. Mr. Palmer was also an instructor in the School Business Management Certificate Program at the University of Southern California. After retirement, Mr. Palmer continued working with LAUSD as a professional expert providing leadership in the areas of grievance resolution and guiding administrators on contract interpretation and employee disciplinary matters. Mr. Palmer also advised the LAUSD Office of Labor Relations on negotiation strategy and impacts on proposed contract language changes. Mr. Palmer currently provides consulting services to school districts and other governmental agencies and is a very active member of the Council's Strategic Support Teams.

James Beekman

James Beekman is the General Manager of Transportation for Hillsborough County (Florida) Public Schools (HCPS). HCPS is currently the 8th largest school district in the nation servicing over 205,000 students. Mr. Beekman began his career in student transportation in 1983 and has been in a leadership role since 1989. He has been active in the Florida Association of Pupil Transportation where he served as a Regional Director, as President and has chaired numerous committees in both operations, fleet and school bus specifications. He was recognized by School Bus Fleet Magazine as the national 2014 Administrator of the Year. In his role at HCPS, he directs the daily operation of Transportation Services which transports over 90,000 students daily on 996 routes that cover an annual total of 17 million miles. In addition to yellow bus, Transportation Services also maintains over 600 vehicles in its white fleet used by a variety of departments in the District. He is a graduate of Florida Southern College in Lakeland with a B.S. in Business**.**

Willie Burroughs

Willie Burroughs is the Chief Operations Officer for the San Antonio Independent School District accountable for child nutrition, transportation, procurement, real property and facilities (maintenance and construction). He received his B.S. in Industrial Engineering (1992) and an MBA (2001) from Clemson University in Clemson, South Carolina. He was also commissioned as a 2nd Lieutenant into the United States Army Signal Corp (1992). Willie worked for 11 years in a number of leadership roles in manufacturing for Cooper Industries. Roles included, but were not limited to: materials analyst, manufacturing engineer, manufacturing supervisor, production manager, project manager, and operations manager. After a successful career in manufacturing, Willie made the transition to the service industry where he was employed by Aramark as General Manager for maintenance operations with the Houston Independent School District (HISD). After five years of service with Aramark, Willie became an employee directly with the HISD where he served in a number of capacities to include, but not limited to: general manager of construction services (Bond), senior manager of contract administration, and senior manager of special projects. Willie served the HISD for nearly 11 years before joining the Dallas Independent School District (DISD) as executive director with responsibilities for maintenance, HVAC, grounds, environmental services, custodial, capital improvement, and energy management where he served for 3.5 years.

Joseph Gomez

Joseph Gomez is a retired Assistant Superintendent of Schools with the Miami-Dade County Public Schools and has been in Procurement Management, Inventory Management, Maintenance, Testing, Textbook Services, Design Standards for over 43 years having worked for Miami-Dade County Public Schools for over 28 years. Prior to this, he was a Contracting Officer for the United States Air Force. He holds Procurement certifications CPPB, CPPO, CPM and APP. Mr. Gomez is presently working as an independent consultant and a commercial and residential realtor.

Bruce Husson

Bruce Husson served a 38-year career in public school district administration, culminating with his final year in 2005-06 as superintendent of the Sweetwater Union High School District in San Diego County, California. At the time, Sweetwater was the largest secondary district in the United States, serving a 7-12 student population of over 41,000 and an adult student population of over 28,000. Mr. Husson oversaw all instructional and business operations of the district. His previous assignment at Sweetwater was Chief Operating Officer, during which his areas of responsibility included district administration, energy conservation, employee benefits, food services, information technology, labor relations, maintenance, personnel services, planning and facilities, purchasing and business support services, telecommunications, and transportation. Prior to his Sweetwater assignments, for 33 years, he served the San Diego Unified School District, which was, at the time, the second largest urban district in California and eighth largest district in the United States. His last assignment in San Diego was Assistant Superintendent, Business Services, leading essentially the same organizational components as those under his jurisdiction as Chief Operating Officer at Sweetwater. Mr. Husson served 8 years as the director of Maintenance and Operations for SDUSD. Mr. Husson earned his Bachelor of Science Degree in Business

Administration from San Diego State University and his Master of Science Degree in School Business Administration from Pepperdine University.

Drew Rowlands

Drew Rowlands currently serves as the Chief Operations Officer for the San Diego Unified School District. He is responsible for management and oversight of a large division of more than 2,200 personnel, providing operational support and services to the students and staff of San Diego Unified. The departments within the Operations Division include Physical Plant Operations, Food and Nutrition Services, School Police Services and, Strategic Sourcing and Contracts. Mr. Rowlands has over 34 years of experience in operations support. Prior to coming to San Diego Unified School District, Mr. Rowlands worked as a consulting engineer, focused on construction inspection and materials testing, and facility condition evaluations. He also completed a career in the United States Navy as a civil engineer, building, maintaining and operating Navy shore installations throughout the world. Mr. Rowlands holds a Master of Science, Financial Management, from the Naval Postgraduate School, and a Bachelor of Science, Civil Engineering, from Pennsylvania State University. He is a Professional Civil Engineer in the State of California.

Christopher Steele

Christopher Steele retired as Assistant Superintendent for Budget & Planning for the Portsmouth (Virginia) Public Schools, and previously served as the Senior Director of Purchases & Supply at Norfolk City Public Schools for over 10 years. Mr. Steele has over 35 years' experience in operational supply chain logistics, financial management, facility management and acquisition contracting with both the public (federal, state, and K-12) and private sector. Mr. Steele holds a master's degree in engineering and business from the University of Kansas, a master's degree in human resource management from Pepperdine University, and a B.S. degree in chemistry from Pennsylvania State University. Mr. Steele attained the following certifications: Certified Public Procurement Officer (CPPO), Certified Purchasing Manager (C.P.M.), Certified Management Accountant (CMA), Certified Purchasing Card Professional (CPCP) and the highest certification level in the federal Acquisition Professional Corps. Mr. Steele is presently working part-time for the Virginia Department of Education and is a board member for two non-profit organizations.

Jaime Torrens

Jaime Torrens is Chief Facilities Officer for Miami-Dade County Public Schools. Mr. Torrens is responsible for facilities planning, construction, maintenance, operations and inspections at the fourth largest school system in the nation. As a member of the Superintendent's Cabinet, he directs a staff of 1,100 professional, technical and contracted personnel responsible for all aspects of 3,100 buildings comprising 48 million square feet on over 400 school campuses and ancillary facilities. Mr. Torrens is leading implementation of the district's $1.7 billion Capital Improvement Program which includes a $1.2 billion voter-approved General Obligation Bond to renovate, construct and modernize school facilities throughout Miami-Dade County. The program includes instructional technology upgrades at every school providing equity throughout all campuses. Mr. Torrens holds a Master of Science in Management Information Systems and a Bachelor of Science in Electrical Engineering from Florida International University and he is a LEED Accredited Professional.

Arnold Viramontes

Arnold Viramontes retired as the Chief Technology Information Officer for the Houston Independent School District, the largest school system in Texas and the 7th largest in the nation. As the CTIO, he oversaw Information Technology, Instructional Technology and Research, and Accountability. Prior to his work at HISD, he was the Chief of Staff for the Dallas Independent School District. Dallas ISD is the 12th largest school district in the nation. As Chief of Staff, Mr. Viramontes oversaw eleven departments, including the Transformation Management Office, the Communications/Public Relations Department, Emergency Services, Athletics Department and the Office of Evaluation and Accountability. Before taking on his duties as chief of staff, Viramontes served as Chief Transformation Officer and led the restructuring of the Dallas ISD central office. In addition, he facilitated and organized the implementation of Dallas Achieves which included the realignment of all district offices, and the reallocation of resources. Mr. Viramontes designed a data-decision process using a business intelligence framework. Mr. Viramontes now serves as the CEO of the Viramontes Group, Inc. (VGI), a technology and corporate consulting company he began in 1972, serving clients in the United States, Mexico, and South America. Arnold was the initial Executive Director of the Telecommunications Infrastructure Fund Board (TIF), an agency created by the Texas Public Utility Regulatory Act of 1995. He managed the nation's largest program for investing in telecommunications infrastructure for Internet access and videoconferencing. TIF was charged with disbursing up to $1.5 billion over a ten-year period to link Texas schools, libraries, higher education institutions, and not-for-profit health care facilities to an advanced telecommunications infrastructure. He is also a Senior Research Fellow at the IC2 Institute at the University of Texas, an organization whose mission is to foster technology, entrepreneurship, and education.

Maurice L. Woods

Maurice Woods currently serves as Chief Strategy & Operations Officer for Broward County Public Schools (BCPS). Strategically, he is responsible for leading the strategic planning process, developing performance metrics, and executing plans to deliver against the strategic goals. Operationally, he manages areas including: transportation, information technology, business services, food services, purchasing and warehousing departments and other related business areas. Maurice is an experienced business executive with demonstrated capabilities in a variety of leadership and general management areas to include: strategic and operational alignment, organizational design, business process improvement, and financial management. He has extensive experience in startup and turnaround environments. Maurice is a Northwestern University-Kellogg School of Management Executive Scholar in Non-profit Management who also earned a dual MBA degree in Strategy and Finance from the same institution. He has a Bachelor of Science degree in Finance and Economics from California State University-Sacramento.

ATTACHMENT B. WORKING AGENDA

Strategic Support/Technical Assistance Team
Organizational Review
Clark County School District
November 13-16, 2018

Working Agenda
Subject to Change as Required

Tuesday, November 13	**Team Arrival**	
6:15 p.m.	**Team to Meet in Hotel Lobby** Renaissance Hotel 3400 Paradise Road 800.291.9434	
6:30 p.m.	**Team Dinner Working Meeting** ENVY Restaurant - Renaissance	**Dr. Jesus Jara,** Superintendent **Jennifer Cupid-McCoy**, Chief of Staff
Wednesday, November 14		
7:00 - 9:00 a.m.	Continental Breakfast & **Team Working Session** CCSD Administrative Center Room 243	
8:15 - 9:00 a.m.	**Team Interview**	**Rick Neal** Chief Operating Officer
9:15 - 10:00 a.m.	**Facilities Team Interviews** Room 407 Supt Conference Room	**Blake Cumbers** Associate Superintendent Facilities Division **Allison Monette** Coordinator
	Purchasing Team Interview Room 243 Side A*	**Steve Staggs** Director Purchasing Warehouse et al.

	Transportation Team Interview Room 243 Side B*	**Shannon Evans** Director, Transportation
10:15 - 11:00 a.m.	**Facilities Team Interview** Room 407 Supt Conference Room	**Josh Chesnik** Director Maintenance & Operations
	Purchasing Team Interview Room 243 Side A*	**Tom Nacos** Director, Contracting
	Transportation Team Interviews Room 243 Side B*	**Jennifer Vobis and Karen Johnson** Directors
11:15 - 12:00 Noon	**Facilities Team Interview** Room 407 Supt Conference Room	**Jeff Wagner** Director, Construction Manager
	Purchasing Team Interview Room 243 Side A*	**Robin Rankow** Coordinator, Logistics
	Transportation Team Interviews Room 243 Side B*	**Shane Byrne, Dan Romero, Marcelo Valenzuela** Transportation Operations Managers
12:15 - 1:15 p.m.	**Working Luncheon**	
1:30 - 2:15 a.m.	**Facilities Team Interview** Room 407 Supt Conference Room	**Duane Resop** Director, Building Department
	Purchasing Team Interview Room 243 Side A*	**Mike Thrower** Supervisor, ERP Operations & Configuration
	Transportation Team Interviews Room 243 Side B*	**Cindy Ozaeta and Terrance Lee** Transportation Operations Supervisors
2:30 - 3:15 p.m.	**Purchasing Team Interview** Room 407 Supt Conference Room	**Rick Baldwin** Director, Demographics, Zoning & GIS
	Purchasing Team Interviews Room 243 Side A*	**Carol Poindexter** Coordinator FOSS, Food Services **Dani Blackburn** Supervisor Food Services
	Transportation Team Interview Room 243 Side B*	**Dispatchers (none available, peak time)**
4:00 - 4:45 p.m.	**Facilities Team Interview** Room 407 Supt Conference Room	**Linda Perri** Director, Real Property Management
	Purchasing Team Interview Room 243 Side A*	**Kris Blake** Coordinator, Contracts Section & Transportation

	Transportation Team Interview Room 243 Side B*	**Amanda Lowry and Amber Rideout** Routers and Schedulers

5:00 p.m.	**Team Discussion of Work Plan for Balance of Site Visit**

Thursday, November 15

7:00 - 8:30 a.m.	**Continental Breakfast & Working Session** ***District Staff should be aware they may be scheduled for desk interviews	
8:45 - 9:30 a.m.	**Facilities Team Interview** Room 407 Supt Conference Room	**Charles Anderson** Director, Maintenance Zones
	Purchasing Team Interview Room 243 Side A*	**Mike McGrath** Coordinator, Maintenance, Ops
	Transportation Team Interview Room 243 Side B*	**Brandon Yacub** Transportation Training Manager
9:45 - 10:15 a.m.	**Facilities Team Interview** Room 407 Supt Conference Room	**Josh Chesnik** Director, Custodial Operations Landscaping & Grounds
	Purchasing Team Interview Room 243 Side A*	**Patrick Murch** Assistant General Counsel Office of the General Counsel
	Transportation Team Interview Room 243 Side B*	**Raymond Negrete** Coordinator, Spec. Operations & Bidding
10:30 - 11:15 a.m.	**Facilities Team Interview** Room 407 Supt Conference Room	**Luci Davis** Manager, Contracts, Procurement & Compliance
	Transportation Department Visit	**Routing & Scheduling Department** Point of Contact: Amber Rideout

12:00 - 1:00 p.m.	**Working Luncheon**

1: 15 - 2:15 p.m.	**Facilities Team Interview** Room 407 Supt Conference Room	**Jessica Kreiter** Program Development and Specialist
	Transportation Department Visit	**Fleet Serv & Maintenance Ops** Point of Contact: **Paul Shelley**
2:30 - 3:30 p.m.	**Facilities Department Visit**	**Maintenance & Operations**
	(Purchasing) P-Card Program	**Shellon Skeete** Coordinator III General Accounting Department
		Graphics Art Center (TBD)s

TBD	**Team Discussion of Work Plan for Balance of Site Visit**	

Friday, November 16

7:00 - 7:30 a.m.	Continental Breakfast	
7:30 a.m. - 12:00 Noon	**Discussion of Findings & Recommendations** Room 243	
12:00 Noon – 1:00 p.m.	**Working Luncheon** and **Debriefing**	**Dr. Jesus Jara** **Jennifer Cupid-McCoy**
1:00 p.m.	**Departures**	

ATTACHMENT C. DISTRICT PERSONNEL INTERVIEWED

- Dr. Jesus Jara, Superintendent
- Jennifer Cupid-McCoy, Chief of Staff
- Rick Neal, Chief Operating Officer
- Patrick Murch, Assistant General Counsel, Office of the General Counsel
- Shellon Skeete, Coordinator III, General Accounting

Facilities Department Staff Interviewed

- Blake Cumbers, Associate Superintendent, Facilities Division
- Allison Monette, Coordinator
- Josh Chesnik, Director IV Facilities Asset Management
- Jeff Wagner, Director, Construction Manager
- Duane Resop, Director Building Department
- Rick Balwin, Director, Demographics, Zoning & GIS
- Linda Perri, Director, Real Property Management
- Charles Anderson, Director, Maintenance Zone
- Josh Chesnik, Director Custodial Operations, Landscaping & Grounds
- Luci Davis, Manager, Contracts, Procurement & Compliance
- Jessica Kreiter, Program Development Specialist, Facilities and Bond Management

Purchasing Department Staff Interviewed

- Steve Staggs, Director, Purchasing Warehousing, mail Services, and Graphic Arts
- Tom Nacos, Director, Contracting
- Robin Rankow, Coordinator, Logistics
- Mike Thrower, Supervisor, ERP Operations & Configuration
- Carol Poindexter, Coordinator, FOSS, Food Services
- Dani Blackburn, Supervisor, Food Services
- Kris Blake, Coordinator, Contracts Section & Transportation
- Mike McGrath, Coordinator, Maintenance Operations, et al.
- Karen Purdy, Supervisor, Technology & Instructional Material
- Leroy Cannon, Supervisor, Warehouse I

Transportation Department Staff Interviewed

- Shannon Evans, Director, Transportation
- Jennifer Vobis, Director I
- Karen Johnson, Director I, Compliance and Safety
- Shane Byrne, Transportation Operations Manager
- Dan Romero, Transportation Operations Manager
- Marcelo Valenzuela, Transportation Operations Manager

Transportation Department Staff Interviewed (continued)

- Cindy Ozaeta, Transportation Operations Supervisor
- Terrance Lee, Transportation Operations Supervisor

- Amanda Lowry, Transportation Operations Supervisor
- Amber Rideout, Coordinator IV
- Brandon Yacub, Transportation Operations Manager (Training)
- Raymond Negrete, Coordinator IV, Special Operations & Bidding
- Paul Shelley, Director I, Fleet Services & Maintenance Operations
- Bruce Clark, Fleet Maintenance Manager

Site Visits

- Northwest Maintenance Center
- Northwest Transportation Facility

ATTACHMENT D. DOCUMENTS REVIEWED

- Job Descriptions
  - Associate Superintendent – Facilities, revised September 4, 2018
  - Chief Operating Officer, revised August 27, 2018
  - Chief Technology Officer, revised July 13, 2017
  - Coordinator I – Fleet Manager, revised 23, 2018
  - Coordinator II – Dietitian, created September 24, 2008
  - Coordinator III – Food Service School Operations, revised January 2014
  - Coordinator III – Food Service Warehouse & Distribution, revised January 2014
  - Coordinator IV – Bus Operations, created December 18, 2008
  - Coordinator IV – Food Service Financial Management, created December 17, 2008
  - Director I – Transportation, created October 1, 2008
  - Director I – Vehicle Maintenance, revised May 26, 2016
  - Director II – Office of the Chief Operating Officer, revised October 23, 2018
  - Director III – Food Service, created October 7, 2008
  - Director III – Purchasing and Warehousing, dated November 24, 2008
  - Director III – Risk & Environmental Services, revised September 29, 2014
  - Director III – Transportation Branch, created September 9, 2008
  - Fleet Maintenance Manager, revised October 11, 2018
  - General Manager – Vegas PBS, revised September 19, 2018
  - Transportation Operations Manager, revised October 22, 2018
- Budgets
  - 2018-2019 Final Budget, dated May 7, 2018
  - 2017-2018 Amended Final Budget, dated December 14, 2017
  - Popular Annual Financial Report, Fiscal Year Ended June 30, 2018
  - Maintenance, Grounds and Custodial Expense Forecasts, Fiscal Year 2019, dated September 30, 2018
- Comprehensive Annual Financial Report
  - Fiscal Year Ending June 30, 2018
  - Fiscal Year Ending June 20, 2017
- CCSD Fast Facts, 2018-2019
- 2018-2019 *An Employees Right to Know* - Handbook
- Clark County School District Location Map, revised July 2018
- State of Nevada Department of Education, Common Elements for Accounting and Reporting K-12 Educational Finances
- Total FTE by Unit – All Funds as of November 1, 2018 (from data provided by CCSD)
- 2018-2019 Employee Count by Group, dated September 10, 2018 (from data provided by CCSD)
- Salary information
  - ESEA Salary History
  - Support Personnel Pay by Grade and Hourly Rates, Salary Schedule for 2018-2019
  - Support Personnel by Grades and Hourly Rates, 2011-2012 to 2016-2017
  - State Reports, FY 2017
- ESEA Negotiated Agreement between the CCSD and the ESEA, 2015-2017

- Educational Personnel: Demographics, Salaries, Professional Development, and Performance Evaluations
- Budget Development of Major Modernization Project
- Organizational Charts
  - District Organizational Chart
  - Facilities Division
  - Facilities Functional Organizational Chart with Salaries 2017
  - Food Services Department
  - Purchasing, Mail Services, Warehousing, Graphic Arts, Functional Organizational Chart
  - Transportation Organizational Chart, dated October 30, 2017
  - Transportation Organizational Chart, dated June 25, 2018
  - Transportation Functional Chart, dated September 20, 2018
- Capital Improvement Program
  - 2015 Project Budget Variance – New ES @ Beltrada and Via Italia
  - Request titled "Creation of a Fund for Maintenance, Operations and Facility Renewal for CCSD Facilities" (undated)
- Audit Reports
  - Contracts Division Audit of the Contracts, Procurement and Compliance Department, dated June 28, 2017
  - Follow up Summary of the Contract Administration Audit, Job# 587-16-12, dated October 2018
  - Auditing Services School Construction Program, by Jefferson Wells, Completed dated August 17, 2005
  - Internal Audit Department, Audit Plan for 2018-2019
  - Internal Audit Department, Audit Plan for 2017-2018
- Surveys
  - Public Education Finances: 2015, Economic Reimbursable Surveys Division Reports, Issued June 2017
  - All Central Services Survey Results Data, dated April 2017
  - All Central Services Survey Results Data, dated April 2018
  - All CGCS – Survey of Operational Services
  - CGCS – Survey of Facilities Maintenance and Operations Practices
  - CGCS – Survey of Purchasing and Inventory Management Practices
  - CGCS – Survey of Transportation Management Practices
- Annual Transportation Report, 2017-2018 School Year
- Fiscal 2018 Fuel Projections and Fuel Hedging, dated October 3, 2018
- Procedures/Guidelines
  - Transportation Department Guidelines for Suggested Walk Path, dated April 17, 2013
  - Vehicle Replacement Matrix 2018
  - Out-of-Services Criteria, 2016-2018
  - Pre-Trip Procedures 1-3
  - School Bus Driver Training Manual, 2017
  - Contract Procurement and Compliance Services Procedures
  - General Bid Terms and Conditions, dated January 10, 2013
  - Purchasing Card Policy and Procedures Manual, dated November 2015
  - Transportation Department Employee Procedures Handbook

- Payroll Data for 2017
- Consultant's Final Report on the CCS Achieve Implementation, TS Group
- Educational and Operational Efficiency Study, Gibson Consulting Group, completed August 31, 2011
- Contractual Authority/Signature Delegations, dated October 4, 2018
- Purchase Order Release Authority, dated October 4, 2018
- KPI Questionnaire
- SMART Goals
  - Paul Shelley, Director I, Vehicle Maintenance
  - Karen A. Johnson, Director, Compliance and Safety – Russell
  - John W. Lockhart, Coordinator IV, NW Yard
  - Jennifer Vobis, Director I, Wallace Yard
- Performance Goals
  - Transportation Department, School Year 2018-2019
- Off-Contract Purchase Orders Under $2,000 for FY18
- Common Purchasing Report Samples
- Purchasing Staffing Lists
- Procurement Procedure Manuals

ATTACHMENT E. SURVEY OF BEST PRACTICES

As part of its peer review process, the Council of the Great City Schools periodically uses a survey instrument that enables a department or division to rate itself on a series of "best practices." The instrument was adapted from one developed by the Florida Office of Program Policy Analysis and Government Accountability (OPPAGA) and Florida's Auditor General as a model instrument to assess school system operations.

The instrument was developed to help school districts 1) use performance and cost-efficient measures to evaluate programs; 2) use appropriate benchmarks based on comparable school districts, government agencies, and industry standards; 3) identify potential cost savings; and 4) focus budget and resources on district priorities and goals, including student performance. The surveys are grounded in a set of "best practices and indicators" that were identified from extensive literature reviews, interviews of education personnel experts, representatives from professional organizations, and educators in other states.

The survey used in the Clark County School District measured 77 standards and 338 indicators in five areas --

- Organizational Structure, Staffing and Performance Measures (5 Standards and 28 Practices)
- Construction Planning (23 Standards and 86 Practices)
- Facilities Maintenance (21 Standards and 76 Practices)
- Student Transportation (19 Standards and 91 Practices)
- Purchasing, Warehousing, and Inventory (9 Standards and 57 Practices)

Organizational Structure

The Chief Operating Officer (COO) reported that his office uses 13 (46%) of the 28 indicators of best organizational structure, staffing, and performance measures in five standards areas.[51]

- Standard 1: The organizational structure of the Operations Services Unit has clearly defined units and lines of authority that minimize administrative costs.
    - The survey instrument indicated that the Operations Services Unit (department) uses four of six (67%) indicators of best practice, including --
        - The department has organizational charts that clearly and accurately depict its organizational structure,

[51] The Council requested that explanations be provided in the survey instrument and documentation compiled and made available during the site visit to support the departments compliance with the standards and best practices. Except for documents provided by the Facilities Division, the review team could not verify the veracity of the self-assessments since, in many cases, no explanations and little documentation was provided by other departments during the site visit.

- Each operational unit in the department has clearly defined responsibilities, and these responsibilities have been clearly communicated to staff and the Board,
- The department's top administrators (directors and others) have reasonable spans of control,
- The department makes changes to its organizational structure to streamline operations and improve operating efficiency,

- It was reported, however, that the Operations Services Unit was not compliant with the following indicators of best practice, including --
  - The department's organizational structure eliminates unnecessary and overlapping functions and excessive administrative layers,
  - The department regularly (at least once every four years) reviews its business practices and organizational structure.

- Standard 2: The department periodically reviews its administrative staffing and makes changes to eliminate unnecessary positions and improve operating efficiency.
  - The survey instrument indicated that the Operations Services Unit (department) uses two of four (50%) indicators of best practice, including --
    - The department assesses the reasonableness of its administrative staffing levels to those of comparable districts using appropriate measures,
    - The department implements changes to its administrative staffing levels when necessary to improve its operating efficiency,
  - It was reported, however, that the unit was not compliant with the following indicators of best practice, including --
    - The department assesses the reasonableness of its administrative staffing levels to those of comparable districts using appropriate measures,
    - Administrative staffing is reasonable given the number of services provided by the department.

- Standard 3: The department has clearly stated goals and measurable objectives that can be achieved within budget for each major operational program.
  - The survey instrument indicated that the Operations Services Unit (department) uses three of nine (33%) indicators of best practice, including --
    - The department can demonstrate that it has clearly stated goals and objectives for these programs,

- The department establishes performance standards indicating the progress it would like to achieve in meeting its objectives during the time frames covered by its budget or strategic plan,

- The department compares its performance to appropriate benchmarks, which may be its past performance or, when data are available, the performance of comparable districts or industry standards,

- It was reported, however, that the unit was not compliant with the following indicators of best practice, including --

  - Goals and objectives reflect the primary purposes of each program and are consistent with the district's strategic plan,

  - For each program, the department has an accountability system for routinely measuring its progress toward meeting its goals and objectives,

  - Program-level accountability systems include policy-level outcomes the board can use to assess performance, as well as lower-level interim outcome and process measures that managers can use to monitor program progress,

  - Program-level accountability systems include linked input, output, process, interim outcome, and outcome measures,

  - Program-level objectives are designed to be able to be achieved within existing resources,

  - The department regularly tracks and uses performance information to make management decisions that maintain the status quo, make budget adjustments, adopt new strategies, streamline operations, outsource program services, or assess already outsourced services.

- Standard 4: The department has clearly stated goals and measurable objectives that can be achieved within budget for each major operational program.

  - The survey instrument indicated that the Operations Services Unit (department) uses two of six (33%) indicators of best practice, including --

    - The department periodically conducts evaluations of its operational programs, functions, or activities using performance information and other reasonable criteria,

    - The department provides evaluation reports to school board members and top-level administrators,

  - It was reported, however, that the unit was not compliant with the following indicators of best practice, including --

    - The department periodically conducts evaluations of its operational programs, functions, or activities using performance information and other reasonable criteria,

- The department provides evaluation reports to school board members and top-level administrators.

- Standard 5: The department reports on the performance and cost-efficiency of its major operational programs to ensure accountability to taxpayers.
  - The survey instrument indicated that the Operations Services Unit (department) uses two of three (67%) indicators of best practice, including --
    - The district periodically reports its progress toward meeting the objectives of its major operational programs to the School Board and Superintendent,
    - The district reports its progress toward meeting the goals of its major operational programs in a manner that is understandable and does not require undue assistance to interpret its meaning or significance,
  - It was reported, however, that the unit was not compliant with the following indicator of best practice --
    - The department has established a mechanism to receive and respond to feedback from stakeholders as an avenue of accountability to improve poor performance and inefficiency.

Construction Planning

The Director of Construction Management reported that his division uses 72 (84%) of 86 indicators of best construction measures in 23 standards areas.

- Standard 1: The district has effective long-range planning processes.
  - The survey instrument indicated that Construction Management uses all six (100%) indicators of best practice, including --
    - The district has established a facilities planning committee that includes a broad base of school district personnel, parents, construction professionals, and other community stakeholders,
    - The district has established authority and assigned responsibilities for facilities planning that includes --
      - Using accurate and relevant planning information through professionals knowledgeable in facilities planning, design, and construction,
      - Addressing the feasibility and cost-effectiveness of alternative program solutions,
      - Evaluating existing facilities support of current and planned programs and activities,

- Reassessing goals and objectives to plan further programs and activities,
- Reassessing the educational program and identified future needs,

- The district estimates facilities and site needs based upon demographic projections that are regularly updated,
- The district prepares an annual comprehensive Five-Year Facilities Work plan,
- Student occupancy/enrollment data are used to ensure that the district is making optimal use of building capacity,
- The district routinely assesses facilities for physical condition, educational suitability, and technology readiness.

- Standard 2: When developing the annual five-year facilities work plan, the district evaluates alternatives to minimize the need for new construction.
  - The survey instrument indicated that Construction Management uses one of five (20%) indicators of best practice, including --
    - New school facilities are planned to accommodate expansion through relocatable or permanent facilities when changes in demographics or rapid growth can be anticipated,
  - It was reported, however, that the unit was not compliant with the following indicator of best practice --
    - The district evaluates, in writing, alternatives to new construction that could reduce demand for new construction (that would include) --
      - Comparing the advantages and disadvantages of alternatives, including long- and short-term cost implications,
      - Alternatives include, but are not limited to, year-round education, extended day schools, block scheduling, changes in grade level configuration, changes in zoning, and use of relocatable facilities (portables),
    - The district has joint-use agreements that share the construction, operation, and maintenance costs of a multi-use complex with a local municipal or county government, further reducing the construction costs of its schools,
    - When appropriate, the school district considers building multi-use complexes to be shared by middle and high schools,
    - A five-year facilities plan that allows for construction only when needs cannot be met through other means.

- Standard 3: The five-year facilities work plan establishes budgetary plans and priorities.

- The survey instrument indicated that Construction Management uses all three (100%) indicators of best practice, including --
  - The five-year facilities work plan identifies sources of funds and accurately itemizes the costs of facility needs such as site purchase, new construction, remodeling, renovation, the long-term use of relocatables, site improvement, and deferred maintenance,
  - District effectively prioritizes construction needs to meet highest needs first, e.g.
    - Projects, including instructional capacity, are given higher priorities than administrative or support projects,
    - Construction and renovation priorities are established to ensure equitable treatment of all areas within the district,
  - The established budget incorporates inflation factors that may affect future construction costs.

- Standard 4: The district ensures responsiveness to the community through open communication about the construction program and the five-year facilities work plan.
  - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --
    - The school board holds regular hearings at which information regarding the construction program is provided,
    - The school board provides a clear explanation of each construction project in a format that allows for public response.

- Standard 5: The district has an effective site-selection process based on expected growth patterns.
  - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --
    - The district begins school-siting decisions well in advance of future needs based on expected demographic changes,
    - The facilities planning committee, or a similar committee, reviews areas for potential sites and provides input on site acquisitions.

- Standard 6: The district considers the most economical and practical sites for current and anticipated needs, including such factors as the need to exercise eminent domain, obstacles to development, and consideration of agreements with adjoining counties.
  - The survey instrument indicated that Construction Management uses 6 of 7 (86%) indicators of best practice, including --

- The district has established appropriate site-selection criteria that incorporates state requirements for Educational Facilities; basic acquisition procedures; and safety, location, environment, soil characteristics, topography, size and shape, accessibility, site preparation, public services, utilities, costs, availability, political implications (zoning, environmental impact report requirements, joint use, etc.), transportation of students, and integration,

- The district properly anticipates and evaluates obstacles to development that includes transportation plans, zoning, environmental concerns, and neighborhood concerns for each site considered,

- When appropriate, the district considers condemnation to acquire selected sites,

- Prices paid for sites reflect fair market value based on independent appraisals,

- The district has an effective mechanism/process to reconcile differences in appraisals,

- Sites selected meet the previously established selection criteria,

  - It was reported, however, that Construction Management was not compliant with the following indicator of best practice --

    - The district determines the most economical and practical locations for sites based on its established criteria and its ranking of potential sites based upon full development costs.

- Standard 7: Funds collected for school projects are raised appropriately.

  - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --

    - The district can demonstrate that, if local bond referendum proceeds are used, the scope of each project is spelled out in the bond resolution,

    - The district evaluates in writing the advantages and disadvantages of alternative methods for funding and financing construction projects when developing its capital planning budget.

- Standard 8: The district approves and uses construction funds only after determining that the project(s) are cost-efficient and in compliance with the lawfully designated purpose of the funds and the district's five-year facilities work plan.

  - The survey instrument indicated that Construction Management uses 3 of 4 (75%) of the indicators of best practice, including --

    - Approved uses of construction funds is determined by the district's Chief Financial Officer to comply with the lawfully designated purpose of the funds,

- The district uses state funds in a timely manner,
- A full accounting of the use of all capital funds is provided to the School Board and the public,

- It was reported, however, that Construction Management was not compliant with the following indicator of best practice --
  - All available capital resources are applied toward the five-year facilities work plan, and limited use capital funds are not diverted to other lower priority allowable uses.

- Standard 9: The district develops thorough descriptions and educational specifications for each construction project.
  - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --
    - The educational specifications effectively address educational program components such as the curriculum, instructional methods, staffing, and support services,
    - Program goals, objectives, and activities along with teaching strategies and instructional methods are defined based on staff input,
    - The needs and design implications of advanced technology such as computers, integrated networks, internet, etc. are identified,
    - New facilities are designed to be adaptable to changes and innovations in education and flexible enough to accommodate a variety of program uses such as variable group size, individualized instruction, team teaching, peer tutoring, cooperative learning, interdisciplinary teaching, use of computers, year-round education, and before- and after-school use,
    - The specifications effectively address spatial relationships such as the location and size of various spaces within and surrounding a facility, the association of those spaces and the ability of individuals to interact between and within the spaces.

- Standard 10: The architectural design fulfills building-specification needs determined by the district.
  - The survey instrument indicated that Construction Management uses 2 of 3 (67%) indicators of best practice, including --
    - The district submits the educational specification and communicates all program requirements to the architect before commencement of written specifications and schematic drawings,
    - The planning leader, the users of the facility, the architect, and engineers match the written specifications and schematics against educational specifications,

- It was reported, however, that Construction Management was not compliant with the following indicator of best practice --
  - The district communicates its findings and recommendations for every step of the design process to the school board.

- Standard 11: New construction, remodeling, and renovations incorporate effective safety features.
  - The survey instrument indicated that Construction Management uses 1 of 2 (50%) indicators of best practice, including --
    - Appropriate safety features that include limited-access entrances, sufficient entrances, and exits, signs, etc. are incorporated into the design of all new construction,
  - It was reported, however, that Construction Management was not compliant with the following indicator of best practice --
    - Whenever facilities are renovated, safety needs are assessed, and safety designs that include lighting, break-proof doors, security systems, fencing, and window or door bars as part of the renovation process are revised or added to the facilities.

- Standard 12: The district minimizes construction, maintenance, and operations costs using cost-effective designs, prototype school designs, and frugal construction practices.
  - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --
    - When selecting designs for new construction, the district evaluates and compares the costs of construction for various designs using school prototypes, energy conservation, life-cycle costing, and operation of the facility,
    - The district encourages the design team to develop practical design solutions that are functional and cost-effective, and when possible, the district selects construction designs that use frugal construction practices,
    - The district uses the results of the life-cycle cost analyses to design, construct, select equipment for, and furnish new facilities to minimize maintenance and operations costs,
    - Consideration is given to maximizing passive design and "green architecture" concepts and techniques such as building orientation, shading walls, and fenestration, using light colors on exterior walls and roofs, etc. to take advantage of or minimize the negative impact of prevailing environmental influences,
    - The district regularly assesses and revises facility designs and construction practices to ensure they minimize maintenance and operations costs based on

appropriate standards from comparable school districts, government agencies, and private industry.

- Standard 13: The district has effective management processes for construction projects.
  - The survey instrument indicated that Construction Management uses 2 of 4 (50%) indicators of best practice, including --
    - The district considers alternative delivery methods, including but not limited to, design/build and turnkey.
    - The project manager is held accountable for keeping facilities construction projects within budget and on time.
  - It was reported, however, that Construction Management was not compliant with the following indicator of best practice –
    - The district has a written evaluation of potential costs and benefits of privatizing part of or the entire construction program.
    - The district has assigned one person with the authority and responsibility to keep facilities construction projects within budget and on schedule.
- Standard 14: District planning provides realistic time frames for implementation that is coordinated with the opening of schools.
  - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --
    - The tasks for achieving all phases of each project are incorporated into and timed with the opening of schools. When time frames are not met, the district revises them accordingly and identifies why they were not met, with updates provided to the school board and public.
    - The plan contains an accountability component that assures the board and the public that the projects in the plan will be implemented at the proposed budget levels and within the time frame outlined.
    - The board receives budget updates at the completion of each phase of design.
- Standard 15: The district requires appropriate inspection of all school construction projects.
  - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --
    - The district requires inspection by competent building code professionals.
    - A final inspection is conducted, and a certificate of occupancy is issued before buildings are occupied.

- If the facility does not pass inspection, the district can document the reasons for failure and the necessary corrective steps taken.

- Standard 16: The district retains appropriate professionals to assist in facility planning, design, and construction.
  - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --
    - The district uses a selection committee to find appropriate professionals for each construction project who are familiar with architecture, design and construction, and engineering.
    - The district can demonstrate that professionals are selected early in the planning process, and that the committee screens written applications and selects an appropriate number of professionals to interview and that the selected candidates are interviewed.
    - The district considers alternative project delivery methods, including but not limited to, design/build and turnkey, and it bases the selection of appropriate professionals on the type of project management selected.
    - Interviewers consider experience; adequacy of technical and support personnel and availability of particular individuals for the type of project management selected; the proximity of the candidate's office to the district; thoroughness; creativity within the context of sound construction practices and wise expenditures of public funds; adequacy of project supervision; sound business procedures and record keeping on the job; financial responsibility; suitability of size and type of organization; methods of operation; willingness of the candidate to make changes in plans at various points in the process; ability and inclination of the candidate to protect the district's interests in his or her dealings with the contractor; minority business enterprise status; and references contacted when selecting project professionals.
    - The district can demonstrate that finalists are evaluated based on interviews; visits to see examples of their work; interviews with previous clients; examination of typical documents such as plans, specifications, and change orders; and visits to the architects' offices (if appropriate).
    - The district can demonstrate that contracts with professionals include all district requirements; meet the requirements of current law; clearly state the amounts and methods of compensation; and that compensation does not encourage overbuilt or extravagant project costs.

- Standard 17: The district follows generally accepted and legal contracting practices to control costs.

- The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --
  - For each new project, the district considers using alternative bidding and construction systems.
  - The district uses generally accepted bidding procedures.
  - Each contract is signed by the appropriate district official and each contractor awarded a contract submits required documentations.

- Standard 18: The district minimizes changes to facilities plans after final working drawings are initiated to control project costs.
  - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --
    - The district utilizes contracting methods that minimize change orders, and all changes to facilities plans after final working drawings are initiated require school board approval.
    - The district can document the reason for any change orders and the person responsible for making them.
    - Change orders implemented do not result in the project exceeding budget, do not compromise educational specifications, do not exceed industry standards, and do not extend the completion date beyond the date projected, unless unforeseen circumstances occur.

- Standard 19: The architect recommends payment based on the percentage of work completed. A percentage of the contract is withheld pending completion of the project.
  - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --
    - The architect recommends payment based on the percentage of work correctly completed and in conformance with contract documents.
    - Payments are made to contractors on the basis of requests for payment reviewed by the architect.
    - A percentage of the contract is withheld pending final completion of the project to cover non-conforming work that must be corrected before occupancy.
    - The district has a system of internal controls to ensure that timely payments are made only after the architect's approval of the work completed and with the concurrence of the district's manager in charge of the project.

- Standard 20: The district conducts a comprehensive orientation to the new facility prior to its use so users better understand the building design and function.
    - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including --
        - The district provides a customized orientation program that includes clear and understandable users' manuals designed for appropriate staff.
        - The architect, the facilities planner, the contractor, and/or the educational administrator share responsibility for the orientation program.
- Standard 21: The district conducts comprehensive building evaluations at the end of the first year of operation and regularly during the next three to five years to collect information on building operation and performance.
    - The survey instrument indicated that Construction Management uses 3 of 5 (60%) indicators of best practice, including --
        - A comprehensive evaluation assessing facility use and operating costs as well as building operation and performance is done by the end of the first year of occupancy.
        - Evaluations are used to make changes, if necessary, to the district's construction planning process for facilities to be built in the future.
        - The district can identify improvements made to its construction planning process based on its analysis of maintenance and operations costs.
    - It was reported, however, that Construction Management was not compliant with the following indicators of best practice --
        - Additional evaluations are performed at appropriate intervals during the first three to five years of operation.
        - Results of evaluations are used to compare the product with educational specifications to see whether the district received the product it said it wanted and whether the district still needs the product it built.
- Standard 22: The district has established and implemented accountability mechanisms to ensure the performance, efficiency, and effectiveness of the construction program.
    - The survey instrument indicated that Construction Management uses 2 of 4 (50%) indicators of best practice, including --
        - The district has clearly stated goals and measurable objectives for the program that reflect the intent (purpose) of the program and address major aspects of the program's purpose and expenditures.

- The district has taken advantage of significant opportunities to improve construction operations management, increase efficiency and effectiveness, and reduce costs.

- It was reported, however, that Construction Management was not compliant with the following indicators of best practice –

  - The district uses appropriate performance and cost-efficiency measures and interpretive benchmarks, including comparisons to adjoining districts, to evaluate the program and uses these in management decision making.

  - The district has established and implemented strategies to continually assess the reliability of program performance and cost data.

- Standard 23: The district regularly evaluates facilities construction operations based on established benchmarks, and it implements improvements to maximize efficiency and effectiveness.

  - The survey instrument indicated that Construction Management uses all (100%) indicators of best practice, including –

    - The district assesses its facilities construction operations as a whole at least annually using performance data and its established benchmarks.

    - The district reports its progress toward meeting its goals, objectives, and benchmarks to the school board and the public on an annual basis.

    - The district has established and implemented strategies based on the outcomes of these recommendations.

Facilities Maintenance

The Directors of the Facility Asset Management and Facility Asset Maintenance Departments reported that their departments use 47 of 76 (62%) indicators of best construction measures in 21 standards areas.

- Standard 1: The district's maintenance and operations department has a mission statement, goals, and objectives that are established in writing.

  - The survey instrument indicated that Facilities Maintenance uses 2 of 3 (67%) indicators of best practice, including --

    - The maintenance department has an approved mission statement that clearly defines the purpose and expected outcomes of the department.

    - The maintenance and operations department has written comprehensive projections of its physical condition and repair/replacement needs of district facilities, including but not limited to paint, roofs, HVAC equipment (tracking age and repair history), grounds (including paving), electrical service, and plumbing.

- It was reported, however, that Facilities Maintenance was not compliant with the following indicator of best practice –
  - The maintenance and operations department has clearly stated goals and measurable objectives for each program that reflect the expected outcomes of the program and address the major aspects of the program's purpose and expenditures.

- Standard 2: The district has established and implemented accountability mechanisms to ensure the performance and efficiency of the maintenance and operations program.
  - The survey instrument indicated that Facilities Maintenance uses 2 of 4 (50%) indicators of best practice, including --
    - The maintenance and operations department regularly evaluates the performance of all maintenance and operations work and can demonstrate that adjustments include reassignment of personnel, relocation of resources, and implementation of new procedures are made to maximize performance and efficiency.
    - The district has taken advantage of opportunities to improve maintenance operations management, increase efficiency and effectiveness, and reduce costs.
  - It was reported, however, that Facilities Maintenance was not compliant with the following indicators of best practice --
    - The maintenance and operations department uses appropriate performance and cost-efficiency measures and interpretive benchmarks to evaluate each program and uses these in management decision making.
    - The maintenance and operations department has established and implemented strategies to continually assess the reliability of program performance and cost data.

- Standard 3: The district obtains and uses customer feedback to identify and implement program improvements.
  - The survey instrument indicated that Facilities Maintenance uses all 3 (100%) indicators of best practice, including --
    - Customer feedback is used to conduct a self-analysis (e.g., assignment of work orders and scheduling, compliance of work assignments) to improve performance and productivity of the maintenance department.
    - Customers are surveyed at least annually using a written instrument to determine the strengths and weaknesses of maintenance department service and to identify major maintenance needs.
    - Customer survey results are shared with customers and staff.

- Standard 4: The district has established procedures and staff performance standards to ensure efficient operations.

- The survey instrument indicated that Facilities Maintenance uses 1 of 5 (20%) indicators of best practice, including --
  - The maintenance department has and follows written procedures that, at a minimum, provide for replacement and selection of equipment; purchase of equipment, supplies, and materials; maintenance and operations budget criteria; facilities standards; personnel staffing and hiring policies; and use of facilities and equipment.
- It was reported, however, that Facilities Maintenance was not compliant with the following indicators of best practice --
  - Written operational procedures for the maintenance and custodial services departments are up to date and accessible to school personnel and the public.
  - The maintenance and operations department has written performance standards or benchmarks of industry practices for staff that are communicated to employees and are available to other interested parties.
  - The district's performance standards ensure that all schools are maintained equitably.
  - The district has a process for communicating failures to meet departmental and staff performance standards and can track responses to those failures.

- Standard 5: The department maintains educational and district support facilities in a condition that enhances student learning and facilitates employee productivity.
  - The survey instrument indicated that Facilities Maintenance uses all 3 (100%) indicators of best practice, including --
    - District educational facilities are effectively maintained and provide an appropriate teaching environment.
    - District educational facilities are effectively maintained and provide an environment conducive to student learning.
    - District support facilities are effectively maintained and provide appropriate working conditions for district employees.

- Standard 6: The district regularly reviews the organizational structure of the maintenance and operations program to minimize administrative layers and assure adequate supervision and staffing levels.
  - The survey instrument indicated that Facilities Maintenance uses 2 of 3 (67%) indicators of best practice, including –
    - The maintenance and operations department is administered through a published organizational chart that has been approved by the school board, e.g.,

- The district provides appropriate supervision of maintenance and operations staff.
- Levels of authority and responsibility have been assigned to each position.

- The department has not, however, established supervisor/employee ratios that are based on appropriate standards or benchmarks

- The program structure includes reasonable lines of authority and spans of control in comparison to industry standards given the responsibilities of each organizational unit.

- It was reported, however, that Facilities Maintenance was not compliant with the following indicators of best practice --

- The maintenance and operations department regularly reviews the program's organizational structure and staffing levels and makes appropriate staffing adjustments based on these reviews. For example--

- The district has appropriate staffing levels based on applicable comparisons and/or benchmarks such as the number of custodial staff members in relation to the size of facilities and other relevant factors.
- Staffing formulas provide for additional staff as new facilities are brought on-line and as existing facilities become older and require more maintenance and provide for deleting staff and closing facilities whenever indicated.
- The district reports organizational staffing review findings in writing and distributes these findings to school board members and the public.

- The department did indicate, however, that staffing projections reflect activities proposed in the five-year facilities work plan.

- Standard 7: Complete job descriptions and appropriate hiring and retention practices ensure that the maintenance and operations department has qualified staff.

- The survey instrument indicated that Facilities Maintenance uses 3 of 4 (75%) indicators of best practice, including --

- Job descriptions have been developed, properly reflect the needs of the department, and are reviewed and updated periodically to address changing requirements and actual practices.

- Job vacancy notices adequately describe job responsibilities; job qualifications; educational/professional requirements; application and selection criteria; and salary and benefits.

- Personnel procedures ensure that adequate personal and professional references are obtained and contacted

- It was reported, however, that Facilities Maintenance was not compliant with the following indicator of best practice --
  - Procedures are established for attracting qualified applicants based on district size, location, and needs.

- Standard 8: The district provides a staff development program that includes appropriate training for maintenance and operations staff to enhance worker job satisfaction, efficiency, and safety.
  - The survey instrument indicated that Facilities Maintenance uses 5 of 10 (50%) indicators of best practice, including --
    - The (staff development) programs include technical training as well as personnel interaction strategies. Training is individualized when possible to fit skills/trades/group needs and assist employees in meeting work standards.
    - Instructors used for staff training are from appropriate trade/instructional areas. Outside professional trainers are used when possible.
    - Training programs provide an opportunity for staff feedback and evaluation.
    - Participation in state and national organizations is supported to remain current with maintenance issues, new technology, equipment, materials, and procedures.
    - The maintenance and operations department subscribes to various trade publications, and the publications are available to employees.
  - It was reported, however, that Facilities Maintenance was not compliant with the following indicators of best practice --
    - The district provides professional development and training programs based on district size and capabilities, identified needs, and relevant trades.
    - Annual planned training programs are implemented for appropriate trades personnel, support and supervisory personnel, and administrators.
    - Written training goals and expected outcomes are established in the areas of safety, trades enhancement, cross-trades utilization, interpersonal team skills, district policy awareness, and department procedures.
    - The maintenance and operations director works closely with the Human Resources Department to ensure a planned, sequential program for personnel skills development.
    - Where possible, there is a defined apprenticeship program.

- Standard 9: The district has developed an annual budget with spending limits for each category of facilities maintenance and operations.

- The survey instrument indicated that Facilities Maintenance uses 1 of 6 (17%) indicators of best practice, including --
  - The budget process provides for routine evaluation of actual versus planned expenditures.
- It was reported, however, that Facilities Maintenance was not compliant with the following indicators of best practice --
  - The annual budget addresses long-term goals for maintaining and operating district facilities.
  - The annual budget addresses ongoing and recurring maintenance tasks to avoid high repair or replacement costs in future years.
  - Funds have been reasonably allocated to address deferred maintenance needs, and these funds are used for their intended purpose.
  - The budgets for physical plant maintenance and custodial services are developed using appropriate professional standards, e.g., similar districts and historical data.
  - Allocations are included for the correction of deficiencies identified in an annual Fire Safety Inspection report, and the district can demonstrate that the monies are used as intended.

- Standard 10: The district accurately projects cost estimates of major maintenance projects.
  - The survey instrument indicated that Facilities Maintenance does not use any of the indicators of best practice, including--
    - Cost estimates are based on the district's experience with prior similar projects, current estimates of cost standards, and market conditions.
    - The cost of inflation for maintenance projects are projected for five years.
    - Regular evaluation of projected cost estimates for accuracy, and the district utilizes this information to improve future estimates.
- Standard 11: The board keeps a maintenance reserve fund to handle one-time expenditures necessary to support maintenance and operations.
  - The survey instrument indicated that Facilities Maintenance does not use any of the indicators of best practice, including --
    - The district and maintenance department do not use the reserve fund for recurring expenses.

- The budgetary policy is flexible enough to ensure funding of unforeseen maintenance needs that could adversely affect the district's mission if not funded (e.g., emergency funds).

- Standard 12: The district minimizes equipment costs through its purchasing practices.
  - The survey instrument indicated that Facilities Maintenance uses 3 of 6 (50%) indicators of best practice, including --
    - Volume purchases are made whenever cost-effective.
    - The maintenance and operations department considers equipment in operating and maintenance costs when buying new equipment.
    - Refurbishing or repairing is considered along with new purchases, and the most cost-effective method is selected.
  - It was reported, however, that Facilities Maintenance was not compliant with the following indicators of best practice --
    - The district regularly conducts cost comparisons to determine whether purchasing practices have minimized costs.
    - Inflationary costs for equipment are provided for a five-year period.
    - Replacement projections have been developed for plant and maintenance equipment.

- Standard 13: The district provides maintenance and operations department staff the tools and equipment required to accomplish their assigned tasks.
  - The survey instrument indicated that Facilities Maintenance uses all 3 (100%) indicators of best practice, including –
    - Maintenance and operations department personnel are provided with the tools necessary to accomplish assigned duties.
    - Seldom-needed tools and equipment are readily available through other sources.
    - A procedure exists for maintenance and operations staff to acquire parts, materials, and equipment that are not stocked on maintenance vehicles.

- Standard 14: The district uses proactive maintenance practices to reduce maintenance costs.
  - The survey instrument indicated that Facilities Maintenance uses 2 of 3 (67%) indicators of best practice, including --

- The maintenance and operations department evaluates cost to maintain specific facility designs and implements strategies to reduce labor and long-term maintenance costs.

- The district has a process in place to ensure that policies and procedures are followed for disposal of surplus furniture and equipment.

  - It was reported, however, that Facilities Maintenance was not compliant with the following indicator of best practice --

    - A preventive maintenance program has been implemented to reduce long-term maintenance costs and service outages.

- Standard 15: The maintenance and operations department identifies and implements strategies to contain energy costs.

  - The survey instrument indicated that Facilities Maintenance uses 1 of 2 (50%) indicators of best practice, including --

    - The district collaborates with its utility providers, government agencies, and uses available local industry experts and/or other organizations to identify energy efficiency benchmarks and implement actions to increase cost-efficiency.

  - It was reported, however, that Facilities Maintenance was not compliant with the following indicator of best practice --

    - The district has a written energy management plan.

- Standard 16: The district has an energy management system in place, and the system is maintained at original specifications for maximum effectiveness.

  - The survey instrument indicated that Facilities Maintenance uses 0 of 3 (0%) of the following indicators of best practice --

    - The district has a written energy management plan in place.

    - The maintenance and operations department regularly monitors energy management controls and generates routine reports to verify the energy management system is working.

    - Plans have been developed to address corrective actions in facilities where the energy management system is less effective.

- Standard 17: District personnel regularly review maintenance and operation's costs and services and evaluate the potential for outside contracting and privatization.

  - The survey instrument indicated that Facilities Maintenance uses all (100%) indicators of best practice, including --

- District personnel regularly evaluate existing services and activities to explore the feasibility of alternative methods of providing services, such as outside contracting and privatization.

- District personnel regularly evaluate all contracted and/or privatized services to verify effectiveness and cost savings.

- Standard 18: A computerized control and tracking system is used to accurately track work orders and inventory.

  - The survey instrument indicated that Facilities Maintenance uses 1 of 3 (33%) indicators of best practice, including --

    - A work order tracking system is used to increase management capability. For example--

      - A computerized work order system includes control of inventory as well as tracking of parts, materials, equipment, and associated costs to individual work orders.

      - An inventory control system accounts for commonly used parts, materials, and equipment, including those carried on maintenance vehicles.

      - An inventory control system includes a procedure to automatically re-order supplies when they are depleted.

      - A system that provides a mechanism to charge back work order expenses to the appropriate entity.

  - It was reported, however, that Facilities Maintenance was not compliant with the following indicators of best practice --

    - The maintenance department analyzes information such as actual work hours (sometimes referred to as "wrench time"), hours scheduled versus hours worked, travel time, and total hours required to complete jobs.

    - Work order reports are routinely produced and analyzed to improve performance.

- Standard 19: The maintenance and operations department has a system for prioritizing maintenance needs uniformly throughout the district.

  - The survey instrument indicated that Facilities Maintenance uses all (100%) indicators of best practice, including --

    - The maintenance and operations department places the highest priority on responding to life, health, and safety issues.

- The maintenance and operations department prioritizes maintenance needs based on its guidelines and completes regular and emergency maintenance repairs accordingly.

- The school district's process of prioritizing maintenance is designed to address every school's needs.

- District procedure determines when emergency maintenance is necessary and provides for effective emergency repairs.

- Standard 20: District policies and procedures clearly address the health and safety conditions of facilities.

  - The survey instrument indicated that Facilities Maintenance uses all (100%) indicators of best practice, including --

    - The district has established written health and safety standards.

    - Evaluations are made and documented on the condition of buildings and each school.

    - The district has a written plan that requires monitoring of indoor air quality as appropriate and includes corrective action plans for indoor air quality problems.

- Standard 21: The school district complies with federal and state regulatory mandates regarding facility health and safety conditions.

  - The survey instrument indicated that Facilities Maintenance uses all (100%) indicators of best practice, including --

    - Procedures comply with all relevant federal and state requirements.

    - The district participates in state and federal voluntary efforts regarding facility health and safety conditions and has documented resulting cost savings and/or avoidance.

Student Transportation

The Operations Supervisor and Director I of Fleet Services reported their department uses 85 (93%) of the 91 indicators of best transportation measures in 20 standards areas.

- Standard 1: The district coordinates long-term planning and budgeting for student transportation.

  - The survey instrument indicated that the Transportation Department uses 3 of 4 (75%) indicators of best practice, including --

    - Transportation staff conducts a systematic assessment of transportation needs to identify priorities and basic needs. The process includes consideration of current

and anticipated budget categories and potential areas of transportation cost savings, such as reducing the number of courtesy riders, reducing the number of spare buses, realigning routes, purchasing larger buses, etc. As part of the budget process, transportation administrators present cost-savings options to the school board and public.

- Transportation planning staff regularly consult with district planning staff to ensure that transportation needs, concerns, and costs are considered when planning for future schools or physical plant needs.

- Transportation planning staff consult regularly with district planning and budgeting staff to develop and present accurate information to the school board on student transportation cost implications of district educational program decisions, such as school choice and magnet schools, charter schools, opportunity scholarships, transportation to higher-performing schools, community busing, exceptional student education programs, and staggered school start times.

- It was reported, however, that the Transportation Department was not compliant with the following indicator of best practice --

  - Transportation planning staff regularly consults with community planners to identify areas in the district where community growth and development will have an impact on the need for student transportation services in the future.

- Standard 2: The district provides regular, accurate, and timely counts to the state on the number of students transported.

  - The survey instrument indicated the Transportation Department uses the indicator of best practice, i.e., --

    - Transportation administrators regularly review student-count information to identify trends and issues that may require managerial or budgetary responses and that may result in cost savings within the present time frame or in the future.

- Standard 3: The transportation department plans, reviews, and establishes bus routes and stops to provide cost-efficient student transportation services for all students who qualify for transportation.

  - The survey instrument indicated the Transportation Department uses 6 of 7 (86%) indicators of best practice, including --

    - Route planning staff annually uses a systematic approach to create and update bus routes (including computer routing) and bus stops that are effective and cost-efficient without compromising safety.

    - Existing bus routes and stops are reviewed on an annual basis for effectiveness, cost efficiency, and safety.

- Route planning staff responds promptly to complaints or suggestions received from school-site staff, parents, or the general public about current or proposed bus routes or a driver's performance on an official assignment.

- Route planning staff members regularly review areas with responsible local or state agencies having jurisdiction over identifying and documenting where hazardous walking conditions exist. The district works cooperatively with local or state agencies whenever possible to eliminate hazardous walking conditions.

- The school board has adopted staggered school start times to help ensure that the district's buses can serve as many students as possible (i.e., maximize the district's average bus occupancy). Alternatively, the district can demonstrate through a financial analysis that staggered school start times would not make student transportation more cost-efficient.

- The district's routing practices result in reasonably high average bus occupancy, and low cost per mile and student, compared to districts with similar demographics and educational programs and exemplar districts.

o It was reported, however, that the Transportation Department was not compliant with the following indicator of best practice --

- The district's policy and practice are not to provide service to courtesy students.

- Standard 4: The organizational structure and staffing levels of the district's transportation program minimizes administrative layers and processes.

  o The survey instrument indicated the Transportation Department uses 2 of 3 (67%) indicators of best practice, including --

    - The transportation program's organizational structure and staffing levels are periodically reviewed to ensure that administrative layers and processes are minimized. The review includes structure/staffing level comparisons with selected peer districts.

    - The district can demonstrate the program has an appropriate structure (including reasonable lines of authority and spans of control) and staffing levels based on applicable comparisons and/or benchmarks.

  o It was reported, however, that the Transportation Department was not compliant with the following indicator of best practice --

    - The district reports organizational structure and administrative staffing review findings to school board members and the public.

- Standard 5: The district maintains an effective staffing level in the vehicle maintenance area and provides support for vehicle maintenance staff to develop its skills.

- The survey instrument indicated the Transportation Department uses all 3 (100%) indicators of best practice, including --
  - District staff periodically evaluates the level of vehicle maintenance staffing and makes adjustments as necessary to operate a cost-efficient operation.
  - The district sends all vehicle maintenance staff to courses and training sessions to improve current skills, develop special expertise not currently represented in the vehicle maintenance shop, and become familiar with emerging technology and techniques.
  - The district provides regular in-service training opportunities for vehicle maintenance staff to receive instruction on district maintenance policies and procedures, including topics of current interest and concern.

- Standard 6: The district effectively and efficiently recruits and retains the bus drivers and attendants it needs.
  - The survey instrument indicated the Transportation Department uses all 4 (100%) indicators of best practice, including --
    - The district notifies the public of job opportunities for bus drivers, substitute bus drivers, and bus attendants. The district uses a variety of approaches and activities to reach individuals likely to be interested in such employment options and takes advantage of effective low-cost venues whenever possible.
    - The district assesses its turnover rate for drivers and attendants and makes changes to practices as necessary to retain drivers and effectively recruit replacements.
    - Transportation staff collects information on wages and benefits offered by adjacent school districts and by local employers that are likely to be competing for the pool of applicants for bus drivers, substitute bus drivers, and bus attendants in the district. Staff regularly uses this information to compare the district's relative competitiveness for these positions when recruiting replacement drivers and attendants and setting salaries and benefits.
    - The district provides bus drivers and attendants with incentives, financial or otherwise, for good performance as demonstrated by their safety records, timeliness, attendance, and ability to maintain discipline on the bus.

- Standard 7: The district trains, supervises, and assists bus drivers to enable them to meet bus-driving standards and maintain acceptable student discipline on the bus.
  - The survey instrument indicated the Transportation Department uses all 6 (100%) indicators of best practice, including --
    - Transportation staff provides or contracts for the initial training required for prospective bus drivers to receive a commercial driver's license.

- The transportation office provides periodic in-service training for bus drivers, substitute bus drivers, and bus attendants that includes topics needed to keep licenses current along with other district transportation needs and concerns.

- Training meets the concerns and needs expressed by drivers and attendants in periodic meetings with transportation management.

- The transportation office provides regular direct oversight of basic bus handling skills, safe driving practices, and pupil management techniques for all school bus drivers.

- The district ensures that all bus drivers receive annual physical examinations as required by statute and maintains records of these examinations.

- The school board has adopted and enforces a safe driver policy that establishes when or if school bus drivers with traffic violations charged against them can continue driving.

- Standard 8: The school district has a process to ensure that a sufficient number of vehicles are acquired economically and will be available to meet the district's current and future transportation needs.

  - The survey instrument indicated the Transportation Department uses all 8 (100%) indicators of best practice, including --

    - The school board has a policy addressing the cost-effective replacement of school buses and other district vehicles that includes criteria such as the age of the vehicle, vehicle mileage, and maintenance costs vs. vehicle value.

    - District staff maintains records of district vehicle purchases over a multi-year period to document that the district's vehicle replacement standards are being met and that sufficient allowance has been made for both projected growth and accommodation of school board program decisions that have an impact on the need for district vehicles.

    - District staff minimizes the number of spare vehicles but ensures that enough spare vehicles are available when needed to cover special situations that may reasonably be expected to occur.

    - Transportation staff maintains regularly updated records on the numbers and types of vehicles in the district.

    - The district uses pool purchase agreements or vehicle purchasing contracts (as applicable) to minimize costs and maximize value unless the district can obtain equivalent vehicles at lesser costs.

- New school buses are phased into service so that new buses are assigned to routes with the greatest need, while older buses are rotated to shorter or smaller routes, used as spare buses, or removed from service.

- The district regularly conducts and documents its reviews of costs related to older vehicles to determine whether they should be maintained in service or not.

- When the district removes vehicles from service, it recovers as much value as possible.

- Standard 9: The district provides timely routine servicing for buses and other district vehicles, as well as a prompt response for breakdowns and other unforeseen contingencies.

  - The survey instrument indicated the Transportation Department uses 6 of 7 (86%) indicators of best practice, including --

    - The transportation office ensures that all bus drivers inspect their buses prior to each bus run and maintain records of such inspections.

    - The district documents quality control reviews of servicing and repair work done on vehicles.

    - The district has a preventive maintenance program for vehicles to provide timely routine servicing that may be on a schedule that differs from calendar-based servicing (e.g., a bus inspection cycle) such as mileage-based servicing.

    - The district has established guidelines to assist in making cost-effective decisions about whether to make complex or expensive repairs on older vehicles.

    - All district vehicles are serviced in a timely and cost-effective manner. Charges/credit for services is made to the appropriate department(s).

    - A vehicle maintenance management system is maintained to provide data on maintenance costs, performance, and operations of school buses and other vehicles.

  - It was reported, however, that the Transportation Department was not compliant with the following indicator of best practice --

    - The district provides a schedule of required inspections for all buses used to transport students. The schedule is distributed to bus drivers and other staff, and timely reminders are issued to ensure that drivers remember to report to vehicle maintenance on their assigned days.

- Standard 10: The district ensures that fuel purchases are cost-effective, and that school buses and other vehicles are efficiently supplied with fuel.

  - The survey instrument indicated the Transportation Department uses 5 of 6 (83%) indicators of best practice, including --

- District departments cooperate with purchasing office staff to develop purchasing arrangements with vendors to ensure that the district receives the most favorable rates available.

- District staff has established procedures to determine when orders to replenish the district's fueling stations should be placed. Also, if exceptions occur, staff members have a specific justification or otherwise analyze the circumstances to ensure that exceptions will not recur.

- District staff has implemented controls over the fueling system to ensure its security and accuracy of its records. If the district does not use an automated fueling system, the staff has a justification why not having one is cost-effective for the district.

- The district ensures that departments using the fueling stations are appropriately billed/credited.

- District staff cooperates with governmental environmental agencies charged with conducting environmental inspections of fueling stations. Staff maintains records of all such inspections, and if deficiencies are encountered, they take prompt action to correct them.

  - It was reported, however, that the Transportation Department was not compliant with the following indicator of best practice --

    - The district has secure fueling stations for buses and other vehicles that are convenient and accessible. District staff periodically reviews whether there are enough locations and whether they are efficiently sited. If not, they make recommendations for change to district administrators.

- Standard 11: The district maintains facilities that are conveniently situated to provide sufficient and secure support for vehicle maintenance and other transportation functions.

  - The survey instrument indicated the Transportation Department uses all 7 (100 %) indicators of best practice, including --

    - All district vehicle service centers have a shop layout that allows technicians to work most of the time in covered areas, and technicians have ready access to the specialized tools and support they need to do their jobs.

    - District staff has established procedures to control and minimize the generation of any hazardous wastes from district vehicle service centers, and any hazardous wastes that are generated are safely and securely stored in accordance with state and federal requirements.

    - All district vehicle service centers include needed storage space for parts, tires, supplies, and related equipment, and access to them is controlled.

- All district vehicle service centers include areas for supporting functions such as computer data entry, paperwork processing, and records storage.
- All district vehicle service centers are securely fenced and lighted, and vehicle routing and parking options are clearly marked.
- The district ensures that district vehicles are securely parked when not in use.
- District staff periodically reviews the sufficiency and efficiency of transportation physical facilities and evaluate the feasibility and desirability of satellite vehicle servicing areas.

- Standard 12: The district maintains an inventory of parts, supplies, and equipment needed to support transportation functions that balance the concerns of immediate need and inventory costs.
  - The survey instrument indicated the Transportation Department uses 6 of 7 (86 %) indicators of best practice, including --
    - The district obtains on a continuing basis those parts, supplies, and services that are needed to support district transportation functions cost-effectively.
    - Parts, supplies, and services that are needed to support district transportation functions are obtained using methods such as competitive bids, local pool purchases, pre-negotiated state contracts, and discounted blanket purchase orders.
    - Transportation-related parts-room staff review all parts, supplies, and services when they are received to ensure that the correct items are delivered, the billing price is correct, and services are satisfactory.
    - All transportation-related parts and supplies are inventoried and tracked via a computer system.
    - The district ensures that transportation-related warranty claims are made against manufacturers or vendors whenever possible. Warranty repairs are performed in-house if shown to be a cost-effective method to make such repairs.
    - The district has controls to prevent the inappropriate use of facilities and supplies, and it maintains the security of parts and supplies in the transportation area.
  - It was reported, however, that the Transportation Department was not compliant with the following indicator of best practice --
    - The district maintains a “just-in-time” inventory of all parts and supplies to minimize the size and cost of inventory while providing needed support to district transportation functions.

- Standard 13: The district maintains an inventory of parts, supplies, and equipment needed to support transportation functions that balance the concerns of immediate need and inventory costs.

  - The survey instrument indicated the Transportation Department uses all 6 (100%) indicators of best practice, including --

    - The district has a process for responding to vehicle breakdowns, and it is clear who should be notified and when. District procedures address the roles and responsibilities of bus drivers, operations staff, vehicle maintenance staff, and school-site staff.

    - The district has an effective process for bus drivers to report their own intention to miss work as soon as possible and for operations staff to respond to those absences with substitute drivers or other solutions.

    - The district effectively responds to bus overcrowding situations. Responses address the immediate situation, and, when appropriate, also provide for longer-term solutions, such as a redesign of affected bus routes.

    - Transportation operations staff maintain records of the number of students who ride longer than the state recommended ride-time standard (or the local ride time standard if the school board has adopted a more stringent standard) and take actions to minimize this number when possible.

    - The school board has adopted and implemented a policy on circumstances under which a bus driver may discharge a student at any stop other than the one the student usually uses.

    - The district has a written process for school-site staff to request and pay all transportation costs (including operational and administrative costs) for all educational, extracurricular, and athletic activity trips.

- Standard 14: The district provides efficient transportation services for exceptional students in a coordinated fashion that minimizes hardships to students.

  - The survey instrument indicated the Transportation Department uses 3 of 4 (75%) indicators of best practice, including --

    - Transportation staff and exceptional student education staff communicate and consult regularly about student transportation services for exceptional students.

    - The district policy, along with district exceptional student education guidelines, ensures that exceptional students ride a regular school bus whenever appropriate.

    - For any exceptional education students who cannot be accommodated on district school buses, suitable alternative arrangements are made.

- It was reported, however, that the Transportation Department was not compliant with the following indicator of best practice --

  - Exceptional student education staff and transportation staff identify exceptional students who qualify for Medicaid funding for certain approved bus runs. The district makes claims for Medicaid reimbursement for transporting those students.

- Standard 15: The district ensures that staff acts promptly and appropriately in response to any accidents or breakdowns.

  - The survey instrument indicated the Transportation Department uses all 3 (100%) indicators of best practice, including --

    - The transportation office equips all school buses with two-way communications devices, and staff always monitor communications when school buses are in service.

    - The district has an effective process for responding to vehicle breakdowns, and it is clear who should be notified and when. District procedures address the roles and responsibilities of district staff, including bus drivers, operations staff, vehicle maintenance staff, and school site staff.

    - The district maintains complete records of all accidents that occur and promptly reports all qualifying accidents to the school board and the state.

- Standard 16: The district ensures that appropriate student behavior is maintained on the bus with students being held accountable for the financial consequences of misbehavior related to transportation.

  - The survey instrument indicated the Transportation Department uses both (100%) indicators of best practice, including --

    - Bus drivers report disciplinary infractions directly to school site staff. School staff report to drivers what disciplinary actions were taken.

    - District policy and procedures require that parents of students damaging buses be assessed repair costs.

- Standard 17: The district provides appropriate technological and computer support for transportation functions and operations.

  - The survey instrument indicated the Transportation Department uses all 3 (100%) indicators of best practice, including --

    - The transportation office has a computerized management information system that administrators use to produce reliable and timely budgeting and expenditure information on student transportation functions, as well as basic performance data for the office. This system is coordinated with other district systems.

- The district maintains computerized data that enables it to record and track information on transportation staff training and certifications, driver's license data, substance abuse testing, and personnel performance.

- Transportation administrators, with the assistance of district information systems staff, periodically review their current level of technological and computer support to identify issues, needs for the future, and coordination with other district systems.

- Standard 18: The district monitors the fiscal condition of transportation functions by regularly analyzing expenditures and reviewing them against the budget.

  - The survey instrument indicated the Transportation Department uses all 3 (100%) indicators of best practice, including --

    - The approved budget for transportation includes appropriate categories by which expenditures may be usefully tracked. Transportation staff systematically reviews expenditures against the budget for these categories. Administrators respond promptly to cost control issues raised during such reviews and identify what actions must be taken, by whom, and when.

    - Vehicle maintenance staff in the transportation office maintain current records of all maintenance and repairs conducted on all vehicles and the costs associated with those repairs. They review those records regularly to identify maintenance cost concerns, such as unexpected patterns of maintenance activity, excessive costs, or high costs associated with types or ages of buses.

    - The district has taken advantage of significant opportunities to improve transportation management, increase efficiency and effectiveness, and reduce costs.

- Standard 19: The district has reviewed the prospect for privatizing transportation functions, as a whole or in part.

  - The survey instrument indicated the Transportation Department uses all 3 (100%) indicators of best practice, including --

    - Transportation staff has developed key unit cost information for student transportation functions and tasks to enable them to make comparisons with those of private providers.

    - Transportation staff periodically reviews the costs associated with transportation functions and tasks that could be conducted by private vendors. When the results of such reviews indicate savings to the district, staff arranges for such functions and tasks to be performed by private vendors.

    - Transportation staff conducts quality assurance checks for any transportation function or task performed by private vendors to ensure that work was conducted in accordance with the original agreement.

- Standard 20: The district has established an accountability system for transportation, and it regularly tracks and makes public reports on its performance in comparison with established benchmarks.

    - The survey instrument indicated the Transportation Department uses all 5 (100%) indicators of best practice, including --

        - The district has clearly stated goals and measurable outcome-oriented objectives for the student transportation program that reflect the intent (purpose) of the program and address major aspects of the program's purpose and expenditures.

        - The district has identified other districts it considers to be peers and exemplars against which it can compare its performance, and it can identify reasons for selecting those districts. The district makes regular comparisons of its performance with those of the peers and exemplars.

        - Transportation administrators have established appropriate performance and cost-efficiency measures and benchmarks (i.e., measurable targets for future performance) for key indicators of student transportation performance.

        - Transportation administrators provide district administrators and the school board an annual "report card" that shows actual performance for all selected performance and cost-efficiency measures in comparison with the selected benchmark for that indicator, the performance of peer districts, and actual performance during the previous year. The district uses this information to assess performance and make management decisions.

        - In addition to "big picture" performance reporting, transportation administrators have established a system of regular management reports throughout the transportation office to track daily and weekly performance for key functions.

Purchasing and Inventory

The Purchasing Director reported his department uses 47 of 57 (82%) indicators of best purchasing and inventory measures in 9 standards areas.

- Standard 1: The district segregates purchasing responsibilities from the requisitioning, authorizing, and receiving functions.

    - The survey instrument indicated the Purchasing and Warehousing Department uses 2 of 6 (33%) indicators of best practice, including –

        - Responsibilities for the requisitioning, purchasing, and receiving functions are segregated from the invoice processing, accounts payable, and general ledger functions.

        - Responsibilities for the purchasing function are segregated from the requisitioning and receiving functions.

- It was reported, however, that the Office of the Chief Financial Officer (not Purchasing) was responsible for the following indicators of best practice[52] --
  - Responsibilities for the invoice processing and accounts payable functions are segregated from the general ledger functions.
  - Responsibilities for the disbursement preparation and disbursement approval functions are segregated from those for recording cash disbursements and general ledger entries.
  - Responsibilities for the disbursement approval function are segregated from those for the disbursement preparation function.
  - Responsibilities for entries in the cash disbursement records are segregated from those for general ledger entries.

- Standard 2: The district has established controls for authorizing purchase requisitions.
  - The survey instrument indicated the Purchasing and Warehousing Department uses 3 of 5 (60%) indicators of best practice, including --
    - Purchases of goods and services are initiated by properly authorized requisitions bearing the approval of officials designated to authorize requisitions.
    - The appropriation to be charged is indicated on the purchase requisition by the person requesting the purchase.
    - Requests for special purpose (non-shelf item) materials or personal services are accompanied by technical specifications.
  - It was reported that the district's Enterprise Resource Planning (ERP) system is responsible for ensuring the district is in compliance with the following indicators of best practice --
    - Requisitions are pre-numbered, and those numbers are controlled.
    - Before commitment, unobligated funds remaining under the appropriation are verified by the accounting or budget department as sufficient to meet the proposed expenditure.

- Standard 3: The district has established authorization controls over purchasing.
  - The survey instrument indicated the Purchasing and Warehousing Department uses 19 of 21 (90%) indicators of best practice, including --

[52] Since the Business and Finance Unit was not requested as part of this review, the team could not validate if the district was in compliance with these indicators of best practices.

- Purchasing authorizations are structured to give appropriate recognition to the nature and size of purchases and the experience of purchasing personnel.
- Procedures are in place to coordinate and consolidate planned purchases.
- Approval procedures exist for purchase order and contract issuance.
- Procedures are in place to consider competitive bids by other agencies (i.e., state contracts, purchasing consortiums, and other districts) in making purchasing decisions.
- Procedures are in place to provide for requesting, receiving, and evaluating competitive bids on the basis of price and quality.
- When practicable, contract or purchasing officer's areas of responsibility are rotated on a regular basis.
- Procedures exist for public advertisement of non-shelf item procurements in accordance with legal requirements.
- Recurring purchases and documentations to justify informal rather than competitive bids are periodically reviewed.
- Policies regarding conflicts of interest and business practice policies are established, documented, and distributed.
- Purchase orders and contracts are issued under numerical or some other suitable control.
- An appropriate number of price quotations are obtained before placing orders not subject to competitive bidding.
- Splitting orders is prohibited to avoid higher levels of approval.
- Price lists and other appropriate records of price quotations are maintained by the purchasing department.
- Procedures are modified when funds disbursed under grant or loan agreements, and related regulations impose requirements that differ from the organization's normal policies.
- Procedures are instituted to identify, before order entry, costs and expenditures not allowable under grant (federal/state) programs.
- An adequate record of open purchase orders and agreements is maintained.
- Purchases made for accommodating employees are prohibited or adequately controlled.

- Predetermined selection criteria exist for awarding personal service or construction contracts, and the award process is sufficiently documented.
- Changes to contracts or purchase orders are subjected to the same controls and approvals as the original agreement.

- It was reported, however, that the Purchasing and Warehousing Department was not compliant with the following indicators of best practice --
  - Purchase prices are periodically reviewed by a responsible employee independent of the purchasing department.
  - A record of suppliers who have not met quality or other performance standards by the purchasing department is maintained.

- Standard 4: The district has established controls for processing invoices to ensure that quantity, prices, and terms coincide with purchase orders and receiving reports.
  - The survey instrument indicated the Purchasing and Warehousing Department uses 2 of 3 (67%) indicators of best practice, including --
    - Differences in invoice and purchase order price, terms, shipping arrangements, or quantities are referred to purchasing for review.
    - The accounting and purchasing departments are promptly notified of returned purchases, and such purchases are correlated.
  - It was reported, however, that the Purchasing and Warehousing Department was not compliant with the following indicator of best practice --
    - The receiving department records and follows up partial deliveries.
- Standard 5: The district has established controls to ensure that goods are received and meet quality standards.
  - The survey instrument indicated the Purchasing and Warehousing Department uses all (100%) indicators of best practice, including --
    - Receiving reports are prepared for all purchased goods.
    - Procedures exist for filing claims against carriers or vendors for shortages or damaged materials.
    - Steps are taken to ensure that goods received are accurately counted and examined to see that they meet quality standards.
    - A permanent record of material received by the receiving department is maintained.

- Receiving reports are numerically accounted for or otherwise controlled to ensure that all receipts are reported to the accounting department.

- Copies of receiving reports are sent directly (hard copy or electronically transferred) to purchasing, accounting, and, if appropriate, inventory recordkeeping.

- A government technical representative is assigned to monitor and evaluate contractor performance and approve receipt of services concerning procurements of special purpose materials, services, or facilities.

- In instances when a receiving department is not used, procedures exist to ensure that goods for which payment is made have been received and are verified by someone other than the individual approving payment that goods have been received and meet quality standards.

- Standard 6: The district segregates responsibilities for custody of inventories from record keeping responsibilities for those assets.

  - The survey instrument indicated the Purchasing and Warehousing Department uses all (100%) indicators of best practice, including --

    - Responsibilities for requisitioning and approving inventory purchases are segregated from those for accounting for inventories.

    - Responsibilities for perpetual inventory accounting are segregated from those of inventory custody.

    - Responsibilities for periodic physical inventories are assigned to responsible employees who have no custodial or record keeping duties.

- Standard 7: The district has established and implemented controls that provide for proper inventory requisitioning.

  - The survey instrument indicated the Purchasing and Warehousing Department uses all (100%) indicators of best practice, including --

    - Procedures exist for requisitioning items from inventory.

    - Requisitions from inventory can only be made by those employees authorized to requisition inventory.

    - Requisitions are documented by signed requisition forms or electronic controls.

    - Reductions in inventory balances are periodically reconciled to inventory requisitions.

- Standard 8: The district has established controls that provide for inventory accountability and appropriate safeguards exist for inventory custody.

- The survey instrument indicated the Purchasing and Warehousing Department uses all (100%) indicators of best practice, including --
  - Inventories are kept in secure facilities and are reasonably safeguarded to provide access only to authorized employees (those charged with custodial responsibilities; protect inventories from physical deterioration; and insure inventories against loss to the extent economically feasible.
  - If inventories are significant, the district maintains records on a perpetual basis.
  - Detailed inventory records are periodically compared with existing inventories.
  - Significant differences between physical counts and recorded quantities are investigated, and the reasons are identified.

- Standard 9: The district periodically evaluates the inventory function to determine its cost effectiveness.
  - The survey instrument indicated the Purchasing and Warehousing Department uses 2 of 3 (67%) indicators of best practice, including --
    - The district implements activity-cost reporting to determine the cost to maintain inventories. Such costs are compared with other alternatives, such as next day inventory services offered by supply vendors to determine the feasibility of using such services,
    - The district ensures that inventory turnover is monitored so that it does not have significant balances of outdated inventories.
  - It was reported, however, that the Purchasing and Warehousing Department was not compliant with the following indicator of best practice --
    - The district periodically reviews inventory levels and compares them with other school districts to ensure that excessive levels are not maintained.

ATTACHMENT F. COUNCIL REVIEWS

History of Strategic Support Teams

The following is a history of the Strategic Support Teams provided by the Council of the Great City Schools to urban school districts over the last 20 years.

City	Area	Year
Albuquerque		
	Facilities and Roofing	2003
	Human Resources	2003
	Information Technology	2003
	Special Education	2005
	Legal Services	2005
	Safety and Security	2007
	Research	2013
	Human Resources	2016
	Special Education	2018
Anchorage		
	Finance	2004
	Communications	2008
	Math Instruction	2010
	Food Services	2011
	Organizational Structure	2012
	Facilities Operations	2015
	Special Education	2015
	Human Resources	2016
Atlanta		
	Facilities	2009
	Transportation	2010
Austin		
	Special Education	2010
Baltimore		
	Information Technology	2011
Birmingham		
	Organizational Structure	2007
	Operations	2008
	Facilities	2010
	Human Resources	2014
	Financial Operations	2015
Boston		
	Special Education	2009
	Curriculum & Instruction	2014
	Food Service	2014
	Facilities	2016

Bridgeport		
	Transportation	2012
Broward County (FL)		
	Information Technology	2000
	Food Services	2009
	Transportation	2009
	Information Technology	2012
	Information Technology	2018
Buffalo		
	Superintendent Support	2000
	Organizational Structure	2000
	Curriculum and Instruction	2000
	Personnel	2000
	Facilities and Operations	2000
	Communications	2000
	Finance	2000
	Finance II	2003
	Bilingual Education	2009
	Special Education	2014
Caddo Parish (LA)		
	Facilities	2004
Charleston		
	Special Education	2005
	Transportation	2014
	Budget and Finance	2018
Charlotte-Mecklenburg		
	Human Resources	2007
	Organizational Structure	2012
	Transportation	2013
Cincinnati		
	Curriculum and Instruction	2004
	Curriculum and Instruction	2009
	Special Education	2013
Chicago		
	Warehouse Operations	2010
	Special Education I	2011
	Special Education II	2012
	Bilingual Education	2014
Christina (DE)		
	Curriculum and Instruction	2007
Cleveland		
	Student Assignments	1999, 2000
	Transportation	2000
	Safety and Security	2000
	Facilities Financing	2000

	Facilities Operations	2000
	Transportation	2004
	Curriculum and Instruction	2005
	Safety and Security	2007
	Safety and Security	2008
	Theme Schools	2009
	Special Education	2017
Columbus		
	Superintendent Support	2001
	Human Resources	2001
	Facilities Financing	2002
	Finance and Treasury	2003
	Budget	2003
	Curriculum and Instruction	2005
	Information Technology	2007
	Food Services	2007
	Transportation	2009
Dallas		
	Procurement	2007
	Staffing Levels	2009
	Staffing Levels	2016
Dayton		
	Superintendent Support	2001
	Curriculum and Instruction	2001
	Finance	2001
	Communications	2002
	Curriculum and Instruction	2005
	Budget	2005
	Curriculum and Instruction	2008
	Organizational Structure	2017
Denver		
	Superintendent Support	2001
	Personnel	2001
	Curriculum and Instruction	2005
	Bilingual Education	2006
	Curriculum and Instruction	2008
	Common Core Implementation	2014
Des Moines		
	Budget and Finance	2003
	Staffing Levels	2012
	Human Resources	2012
	Special Education	2015
	Bilingual Education	2015
Detroit		
	Curriculum and Instruction	2002

	Assessment	2002
	Communications	2002
	Curriculum and Assessment	2003
	Communications	2003
	Textbook Procurement	2004
	Food Services	2007
	Curriculum and Instruction	2008
	Facilities	2008
	Finance and Budget	2008
	Information Technology	2008
	Stimulus planning	2009
	Human Resources	2009
	Special Education	2018
Fresno		
	Curriculum and Instruction	2012
	Special Education	2018
Guilford County		
	Bilingual Education	2002
	Information Technology	2003
	Special Education	2003
	Facilities	2004
	Human Resources	2007
	Transportation	2017
Hillsborough County		
	Transportation	2005
	Procurement	2005
	Special Education	2012
	Transportation	2015
Houston		
	Facilities Operations	2010
	Capitol Program	2010
	Information Technology	2011
	Procurement	2011
Indianapolis		
	Transportation	2007
	Information Technology	2010
	Finance and Budget	2013
	Finance	2018
Jackson (MS)		
	Bond Referendum	2006
	Communications	2009
	Curriculum and Instruction	2017
Jacksonville		
	Organization and Management	2002
	Operations	2002

	Human Resources	2002
	Finance	2002
	Information Technology	2002
	Finance	2006
	Facilities operations	2015
	Budget and finance	2015
Kansas City		
	Human Resources	2005
	Information Technology	2005
	Finance	2005
	Operations	2005
	Purchasing	2006
	Curriculum and Instruction	2006
	Program Implementation	2007
	Stimulus Planning	2009
	Human Resources	2016
	Transportation	2016
	Finance	2016
	Facilities	2016
	Curriculum and Instruction	2016
Little Rock		
	Curriculum and Instruction	2010
Los Angeles		
	Budget and Finance	2002
	Organizational Structure	2005
	Finance	2005
	Information Technology	2005
	Human Resources	2005
	Business Services	2005
Louisville		
	Management Information	2005
	Staffing Levels	2009
	Organizational Structure	2018
Memphis		
	Information Technology	2007
	Special Education	2015
	Food Services	2016
	Procurement	2016
Miami-Dade County		
	Construction Management	2003
	Food Services	2009
	Transportation	2009
	Maintenance & Operations	2009
	Capital Projects	2009
	Information Technology	2013

Milwaukee		
	Research and Testing	1999
	Safety and Security	2000
	School Board Support	1999
	Curriculum and Instruction	2006
	Alternative Education	2007
	Human Resources	2009
	Human Resources	2013
	Information Technology	2013
Minneapolis		
	Curriculum and Instruction	2004
	Finance	2004
	Federal Programs	2004
	Transportation	2016
	Organizational Structure	2016
Nashville		
	Food Service	2010
	Bilingual Education	2014
	Curriculum and Instruction	2016
Newark		
	Curriculum and Instruction	2007
	Food Service	2008
New Orleans		
	Personnel	2001
	Transportation	2002
	Information Technology	2003
	Hurricane Damage Assessment	2005
	Curriculum and Instruction	2006
New York City		
	Special Education	2008
Norfolk		
	Testing and Assessment	2003
	Curriculum and Instruction	2012
	Transportation	2018
	Finance	2018
	Facilities Operations	2018
Omaha		
	Buildings and Grounds Operations	2015
	Transportation	2016
Orange County		
	Information Technology	2010
Palm Beach County		
	Transportation	2015
	Safety & Security	2018
Philadelphia		

	Curriculum and Instruction	2003
	Federal Programs	2003
	Food Service	2003
	Facilities	2003
	Transportation	2003
	Human Resources	2004
	Budget	2008
	Human Resource	2009
	Special Education	2009
	Transportation	2014
Pittsburgh		
	Curriculum and Instruction	2005
	Technology	2006
	Finance	2006
	Special Education	2009
	Organizational Structure	2016
	Business Services and Finance	2016
	Curriculum and Instruction	2016
	Research	2016
	Human Resources	2018
	Information Technology	2018
	Facilities Operations	2018
Portland		
	Finance and Budget	2010
	Procurement	2010
	Operations	2010
Prince George's County		
	Transportation	2012
Providence		
	Business Operations	2001
	MIS and Technology	2001
	Personnel	2001
	Human Resources	2007
	Special Education	2011
	Bilingual Education	2011
Puerto Rico		
	Hurricane Damage Assessment	2017
	Facilities Training	2018
Reno		
	Facilities Management	2013
	Food Services	2013
	Purchasing	2013
	School Police	2013
	Transportation	2013
	Information Technology	2013

Richmond		
	Transportation	2003
	Curriculum and Instruction	2003
	Federal Programs	2003
	Special Education	2003
	Human Resources	2014
	Budget and Finance Operations	2018
Rochester		
	Finance and Technology	2003
	Transportation	2004
	Food Services	2004
	Special Education	2008
Sacramento		
	Special Education	2016
San Antonio		
	Facilities Operations	2017
	IT Operations	2017
	Transportation	2017
	Food Services	2017
	Human Resource	2018
San Diego		
	Finance	2006
	Food Service	2006
	Transportation	2007
	Procurement	2007
San Francisco		
	Technology	2001
St. Louis		
	Special Education	2003
	Curriculum and Instruction	2004
	Federal Programs	2004
	Textbook Procurement	2004
	Human Resources	2005
St. Paul		
	Special Education	2011
	Transportation	2011
	Organizational Structure	2017
Seattle		
	Human Resources	2008
	Budget and Finance	2008
	Information Technology	2008
	Bilingual Education	2008
	Transportation	2008
	Capital Projects	2008
	Maintenance and Operations	2008

	Procurement	2008
	Food Services	2008
	Capital Projects	2013
Toledo		
	Curriculum and Instruction	2005
Washington, D.C.		
	Finance and Procurement	1998
	Personnel	1998
	Communications	1998
	Transportation	1998
	Facilities Management	1998
	Special Education	1998
	Legal and General Counsel	1998
	MIS and Technology	1998
	Curriculum and Instruction	2003
	Budget and Finance	2005
	Transportation	2005
	Curriculum and Instruction	2007
	Common Core Implementation	2011
Wichita		
	Transportation	2009
	Information Technology	2017