

**LEADERSHIP, GOVERNANCE, MANAGEMENT,
AND FINANCE TASK FORCE**

COUNCIL OF THE GREAT CITY SCHOOLS

Task Force on Urban School Leadership, Governance, Management, and Finance

2020-2021

Task Force Goals

- To improve the quality of leadership in urban public education.
 - To improve the effectiveness of urban school boards
 - To lengthen the tenure of urban school superintendents
- To enhance accountability, management, and operations of the nation's urban public
 - To challenge the inequities in state funding of urban public schools.
 - To increase federal funding and support of urban public schools.
- To pass new federal school infrastructure legislation to help repair, renovate and build urban public school buildings.
- To enhance the ability of urban schools to use Medicaid for health services to students.
 - school systems.

Task Force Chairs

Barbara Jenkins, Orange County Superintendent
Ashley Paz, Fort Worth School Board

HARVARD-GREAT CITY SCHOOLS INSTITUTE

Harvard-Great City Schools ABC Institute

May 8, 2020

Participants in the Harvard/Great City Schools Board Institute--

I am writing to let you know that Harvard University has informed us that the school board/superintendent institute that we had scheduled for July 26-29, 2020, has been postponed to approximately the same time in July 2021 because of the COVID-19 pandemic. They have indicated to us that the decision was driven entirely by their/our commitment to your health and safety.

We look forward to continuing this institute in 2021. We plan to keep your district on the list of participants for next year unless you tell us that you no longer wish to participate. In the meantime, Harvard is looking at options for holding some version of the institute on-line, but no decisions have been made yet. For those of you who want immediate assistance with your board, please let me know and we can arrange to have our new Director of Governance work with you.

The Council of the Great City Schools is sorry for the inconvenience this may cause; we were holding out hope that we would be able to do this, but unfortunately the virus would not cooperate. We plan to correspond with you from time to time over the next few months to keep you posted on plans for next year. We appreciate your understanding. Thank you.

--Michael Casserly
Council of the Great City Schools

PS Please distribute this to individual board members who were planning on attending. Thank you

May 18, 2020

Participants in in the Harvard/Great City Schools Board Institute--

Our partners at Harvard University have found a new date for our school board-superintendent institute: July 18-21, 2021. We will keep everyone who has signed up for this year's institute on the list for next year, so you don't have to do anything for the moment if you still plan to attend next year . We will take people off the list only if you tell us that you will not be able to attend on this new date in 2021. Even though this is over a year away, I hope you will attend since this is some of the best professional development you will ever get. Thank you so much for your patience as we have worked this through with the people at Harvard. Please pass this onto your colleagues who were planning to attend. Many thanks.

--Michael Casserly
Council of the Great City Schools

Tentative Participants in 2021 Harvard—Great City Schools ABC Institute

July 18-21, 2021

Atlanta

Superintendent

Nine school board members

Aurora

Superintendent

Six school board members

Boston

Two school board members

Cincinnati

Superintendent and Treasurer

Three school board members

Fort Worth

Superintendents

Seven school board members

Houston

Superintendent

Nine school board members

Jackson

Superintendent

Six school board members

Omaha

Superintendent

Seven school board members

Orange County (Orlando)

Superintendent

Nine school board members

Pittsburgh

Superintendent

Three school board members

Sacramento

Superintendent

Seven school board members

San Francisco

Superintendent

Seven school board members

Seattle

Superintendent

Three school board members

Waiting List

Arlington (TX)

Superintendent

Six school board members

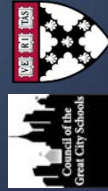
Council of the Great City Schools Leadership Institute:

A Harvard Business School Executive Education Program

July 26-29, 2020



Preliminary Information



HARVARD | BUSINESS | SCHOOL
Executive Education

Program Overview



Program Objective

• This custom-designed Executive Education program is being held by Harvard University and the Council of the Great City Schools to strengthen the competencies and capabilities of member school boards and superintendents. The program recognizes the essential role school boards play in improving and sustaining student outcomes and creating the conditions for urban school system success.



Target Participants

- Council Member School Board Chairs, New Board Members, and Other Board Members
- Council Member District Superintendents



Program Structure and Dates

- 4-day residential program, July 26-29, 2020
- Multiple plenary class sessions
- Daily breakout sessions and team time
- Networking lunches, receptions, and dinners



Program Location

- Harvard Business School Executive Education Complex, Boston, MA



About the Program

Classroom sessions will use the famous Harvard Business School (HBS) case study method along with opportunities to participate in small team discussions, simulations, and application exercises. The program will focus on three broad themes, including—

- Mission/Goal/Strategy Alignment
- What Success Looks Like
- How to Shape the Conditions for Success and Assess Progress

In addition to classroom sessions, you will experience dedicated small-group sessions to help you develop the skills you need to function better when you return home. Sessions will use the Student Outcomes Focused Governance Model developed by the Council of the Great City Schools that will leave you with tangible tools for immediately improved governance for your district.



Program Fees and Benefits

\$3,750 per person



What does this cover?

Faculty instruction from professors from the Harvard Business School (HBS), Harvard Graduate School of Education (HGSE), and the Harvard Kennedy School of Government (HKS)

Three-night single-occupancy bedroom per person

Standard daily meal and beverage services, including breakfast, morning break, lunch, afternoon break, dinner, and opening and closing receptions

Use of Harvard Business School facilities, including on-campus classrooms, breakout rooms for small group meetings, the HBS fitness center, and Baker Library;

Program materials including books, program notes and program binder, case studies, articles, program handouts, and evaluations

Harvard certificate at the conclusion of the program

Administrative support, including pre-program administration, mailings, and support during the program

Program Web Site, which includes electronic access to case materials, faculty biographies, program logistics, and program schedule

Bus transportation to the airport from HBS at the conclusion of the program

HBS tote bag for each participant



Group photo

A one-year complimentary subscription to The Harvard Business Review for each participant

Access to the HBS Working Knowledge site

An invitation to join the LinkedIn Harvard Business School Executive Education Group, the official group for past participants and alumni of Harvard Business School Executive Education programs



Program Fees and Benefits

What is not included and is the responsibility of the individual program participant?



- ▶ Participant travel to the Harvard Business School Campus
- ▶ Off-campus lodging before, during, or after the program
- ▶ Transportation from the airport to the Harvard Business School campus
- ▶ All food service and meals not previously stated above
- ▶ Non-standard food or beverage requirements, location changes, or entertainment
- ▶ Costs associated with any medical treatment (including emergency medical transportation) incurred by participants during the program



- ▶ All incidental charges such as telephone calls, laundry, dry-cleaning, etc.



How will my board benefit?

- ▶ **Improved student achievement begins with strong and effective school board governance.** Faculty from the Harvard Business School, the Graduate School of Education, and the Kennedy School of Government are internationally recognized as thought leaders on crucial governance issues, dynamic relations with high-performing urban school systems, non-profit organizations, and top organizations around the world. The challenges that urban school boards face are unique, but there is also much to be learned from other sectors and from each other.
- ▶ **The Institute will provide a rare opportunity** to interact with other big-city school board members and superintendents on the critical issues of improved governance and better student outcomes. Measurable outcomes for your board and your district should include—



How to enroll?



Please email Michael Casserly, Executive Director of the Council of the Great City Schools, at mcasserly@cgcs.org with the names of board members and superintendents who will attend.



Please include the email addresses of all participants. Only one list of participants is needed per district; individuals need not respond separately.



We encourage both the board president and superintendent to attend as well as other board members. (This event is professional development, but we encourage you to consult with your legal counsel to ensure that "open meetings" requirements are met.)



There are a limited number of seats for this unique opportunity, so we encourage you to register as soon as possible.



GOVERNANCE REVIEWS

CGCS Governance Review

Process Overview

INTRODUCTION

Overview

The Council of the Great City Schools (CGCS) provides full governance team and governance process review services to member districts through its *Governance Review Teams (GRT)*. The full governance review entails a major commitment from the school district as it requires the timely collection of important data and information, the participation of key officials and staff in phone-based and on-site interviews, the coordination of school board visits, and the completion of longitudinal governance and student performance data sets for the Council's analysis. The Board Chair and Superintendent of the school district must request the review and all travel expenses of the team must be covered by the requesting district.

Scope

A team of experienced Superintendents and board members from urban districts is assembled to form the GRT that will examine the district's program, materials and data in addition to conducting interviews and school visits. The review includes an extensive data analysis of longitudinal data sets regarding school board behaviors and overall student performance in the district. The GRT also conducts a comparative analysis of the school board relative to other school boards in the Council.

The final report is written for and is designed to be easily used by the school board, rather than the general public. Because the reports are focused exclusively on the school board, as opposed to the work of the Superintendent and administration, the Findings & Conclusions and Recommendations sections are organized into the same six research-based categories that the CGCS' Student Outcome Focused Governance framework is divided into:

- **Vision & Goals:** evaluates the extent to which the Board will, in collaboration with the Superintendent, adopt a vision & goals that are student outcomes focused.
- **Values & Constraints:** evaluates the extent to which the Board will, in collaboration with the Superintendent, adopt or revise policies and constraints to be student outcomes focused.
- **Accountability & Monitoring:** evaluates the extent to which the Board will devote significant time monthly to monitoring progress toward the vision & goals.
- **Communication & Collaboration:** evaluates the extent to which the Board will lead transparently and include stakeholders in the pursuit of the vision & goals.
- **Unity & Trust:** evaluates the extent to which the Board will lead with one voice in its pursuit of the vision and goals.
- **Continuous Improvement:** evaluates the extent to which the Board will invest time and resources toward improving its focus on the vision and goals.

PROCESS

Timeline

The timeline for completion of this work typically takes between 4 and 6 months. This length of time allows for both the internal and external aspects of the review to be conducted. Internal aspects of the review include time for the district to submit requested documents and data, and time for interaction with Board Members individually and the Board collectively. External aspects of the review include time spent interacting with individuals and organizations outside of the school district in an effort to understand the local context in which the district operates. Finally, the timeline allows GRT members sufficient time to review the submission, conduct data analyses, conduct interviews/visits, and to write the report. Examples of the specific tasks included in the workplan are provided below.

Research

The GRT reads relevant portions of the district's state education laws, board policy, administrative procedures, and reviews recent media to gain an appropriate understanding of the school board's current context.

Data Reviews

The GRT pours over governance survey data, comparing it with responses from other Council districts, to begin understanding board member and superintendent perspectives and practices. The GRT analyzes district student performance data, comparing it with academic KPIs from other Council districts, to gain clarity regarding current areas of strength and weakness concerning student outcomes.

A significant part of data review is the viewing and coding of recent board meetings. The GRT will generally code between 3 and 12 months worth of board meetings.

Phone Interviews

The GRT visits with each board member, with the superintendent, and with select community and staff members identified by board members and the superintendent. The intention of these interviews is to deepen the GRT's understanding of the school board's needs and of collective willingness to engage in this work.

Site Visits

The GRT will, on occasion, conduct a site visit to observe board meetings, to interact with the board as a whole, and/or to interact with the superintendent's cabinet as a whole.

Preliminary Report

Once a rough draft has been developed, it will be reviewed with the school board chair and superintendent and any necessary inaccuracies or misunderstandings can be addressed. To avoid it becoming a public document, it will not be given to the district.

Final Report

The deliverable is a comprehensive report with concrete recommendations. A final draft is delivered to the Board Chair and Superintendent for review prior to finalization for publication.

Estimated Costs

The GRT conducts governance reviews only for CGCS member districts at the request of the Board Chair and Superintendent. The cost for conducting these comprehensive reviews is a factor of the team's size, the number of days required to conduct the site visit and interviews, and the related travel expenses. Council staff time and resources for conducting analyses and writing the report are mostly absorbed by the Council. Exact costs are negotiable.

SAMPLE REPORT TABLE OF CONTENTS

What follows is one example of what the table of contents of the GRT final report might look like after the review process is complete.

INTRODUCTION

- Overview
- Summary

PROCESS

- Internal
- External

FINDINGS & CONCLUSIONS

- Vision & Goals
- Values & Constraints
- Accountability & Monitoring
- Communication & Collaboration
- Unity & Trust
- Continuous Improvement

RECOMMENDATIONS

- Vision & Goals
- Values & Constraints
- Accountability & Monitoring
- Communication & Collaboration
- Unity & Trust
- Continuous Improvement

APPENDICES

- A. Relevant Sections of Board Policy
- B. Student Outcomes Data
- C. Recent Board Goals
- D. Relevant Sections of Governance Survey Results
- E. Board Time Use Results
- F. Recent Superintendent Contract
- G. Recent Board Self Evaluation Instrument
- H. Recommended Board Procedures
- I. Timeline of Proposed Next Steps

CGCS Governance Technical Assistance and Professional Development

Overview

The Council of the Great City Schools offers technical assistance and professional development to its member school boards and superintendents along with its proposed governance audits and its Harvard University program. The technical assistance and professional development are typically offered in a series of four-to-five all day sessions that are led by one or two Council staff members and consultants. Components include—

Why Some Urban School Systems Improve Faster than Others. This presentation and discussion summarize much of the Council's years-long research on why and how some urban school systems improve faster than others do, and what the school board's role in that improvement is.

School Board Survey. This discussion summarizes the results of an in-depth survey administered to the board of education and superintendent that covers basic board characteristics, information on how the board spends its time, and features of the board's work. Comparisons are made to results from other major city school systems.

Roles and Responsibilities. This portion of the professional development covers roles and responsibilities of the school board and how they differ from the role of the superintendent and the administration. The discussion differentiates system inputs, outputs, and outcomes and describes what the roles of the board and superintendent are in each. The discussion features characteristics of functional and dysfunctional school boards. Finally, the professional development also includes a component on what the board's role is in setting the culture of the district.

Goal-setting and Evidence. The technical assistance includes a major component that helps boards and superintendents jointly set or amend student-outcome focused goals. The exercises include the discussion and development of key performance indicators (KPIs) to assess progress on the goals. And the training includes defining various guard rails or constraints that the board does not want to see happen in the pursuit of the goals.

Goal Monitoring. This portion of the professional development focuses on the school board's critical role in monitoring progress on the goals rather than on various programmatic inputs. The work includes calendaring board consideration of goals and KPIs at regular school board meetings throughout the year.

Board and Superintendent Evaluations. The sessions also include discussions on how the goals and progress on them inform the evaluation of the superintendent and the school board.

School Board Meetings. This portion of the technical assistance and professional development includes agenda setting and effective school board meetings.

INTEROPERABILITY SURVEY RESULTS

Summary Comparison of Responses on Interoperability Survey

Council of the Great City Schools

March 2020

	Superintendents	CAOs	CIOs	Procurement Directors
Does leadership understand benefits of interoperability?	77% yes	70% yes	60% yes	53% yes
How is your department involved in technology acquisitions?	NA	70% participated in evaluation & selection of products	80% participated on implementation team	77.8% participated in evaluation & selection of products
How do schools purchase technology-related products?	42% restricted to purchase through a pre-approved catalog of products	70% directly from the vendor	100% directly from vendor	72.7% restricted to purchase through a pre-approved catalog of products
Is there a minimum cost/contract value for including the technology department in purchases?	NA	65% no	90% no	50% no
What is most challenging part of technology acquisitions?	28.6% technical specifications & requirements.	35% technical specifications & requirements and communications	70% communications	50% technical specifications & requirements.
Is the cost of a purchase a factor in including technology standards in contract?	NA	45% yes	80% no	33% yes/no/not sure
Prioritize factors in technology acquisitions.	NA	6.05 privacy 4.95 security	5.9 privacy 5.9 security	7.0 security 6.75 privacy
Does district maintain an inventory of technology products?	95% yes	90% yes	60% yes	NA
Do you track the usage of these products?	90% yes	88% yes	50% yes	NA

Do you evaluate the effectiveness of these products?	45% yes	70% yes	50% yes	NA
Have you made procurements that require interoperability?	NA	NA	NA	74% yes
Do you have boiler-plate language requiring interoperability in procurements?	NA	NA	NA	77.8% no
Do you have authority to implement, encourage, or require interoperability?	NA	NA	NA	69% yes
Do you have examples of when interoperability standards worked well?	NA	NA	NA	82% no
Do you have examples of when interoperability standards did NOT work well?	NA	NA	NA	85% no

MANAGING FOR RESULTS

Managing for Results in America's Great City Schools 2020

RESULTS FROM FISCAL YEAR 2018-19



ActPoint KPI
PERFORMANCE MANAGEMENT SYSTEM

A REPORT OF THE PERFORMANCE MEASUREMENT AND BENCHMARKING PROJECT

OCTOBER 2020

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INTRODUCTION

OVERVIEW

The Performance Management and Benchmarking Project

In 2002 the Council of the Great City Schools and its members set out to develop performance measures that could be used to improve business operations in urban public school districts. The Council launched the Performance Measurement and Benchmarking Project to achieve these objectives. The purposes of the project were to:

- Establish a common set of **key performance indicators** (KPIs) in a range of school operations, including business services, finances, human resources, and technology;
- Use these KPIs to benchmark and compare the performance of the nation’s largest urban public school systems;
- Use the results to improve operational performance in urban public schools.

Since its inception, the project has been led by two Council task forces operating under the aegis of the organization’s Board of Directors: the Task Force on Leadership, Governance, and Management, and the Task Force on Finance. The project’s work has been conducted by a team of member-district managers, technical advisors with extensive expertise in the following functional areas: business services (transportation, food services, maintenance and operations, safety and security), budget and finance (accounts payable, financial management, grants management, risk management, compensation, procurement and cash management), information technology, and human resources.

Methodology of KPI Development

The project’s teams have used a sophisticated approach to define, collect and validate school-system data. This process calls for each KPI to have a clearly defined purpose to justify its development, and extensive documentation of the **metric definitions** ensures that the expertise of the technical teams is fully captured.

At the core of the methodology is the principle of **continuous improvement**. The technical teams are instructed to focus on operational indicators that can be *benchmarked* and are *actionable*, and thus can be strategically managed by setting improvement targets.

From the KPI definitions the surveys are developed and tested to ensure the comparability, integrity and validity of data across school districts.

Power Indicators and Essential Few

The KPIs are categorized into three levels of priority—Power Indicators, Essential Few, and Key Indicators—with each level having its own general purpose.

- **Power Indicators:** Strategic and policy level; can be used by superintendents and school boards to assess the overall performance of their district’s non-instructional operations.
- **Essential Few:** Management level; can be used by chief executives to assess the performance of individual departments and divisions.
- **Key Indicators:** Technical level; can be used by department heads to drive the performance of the higher-level measures.

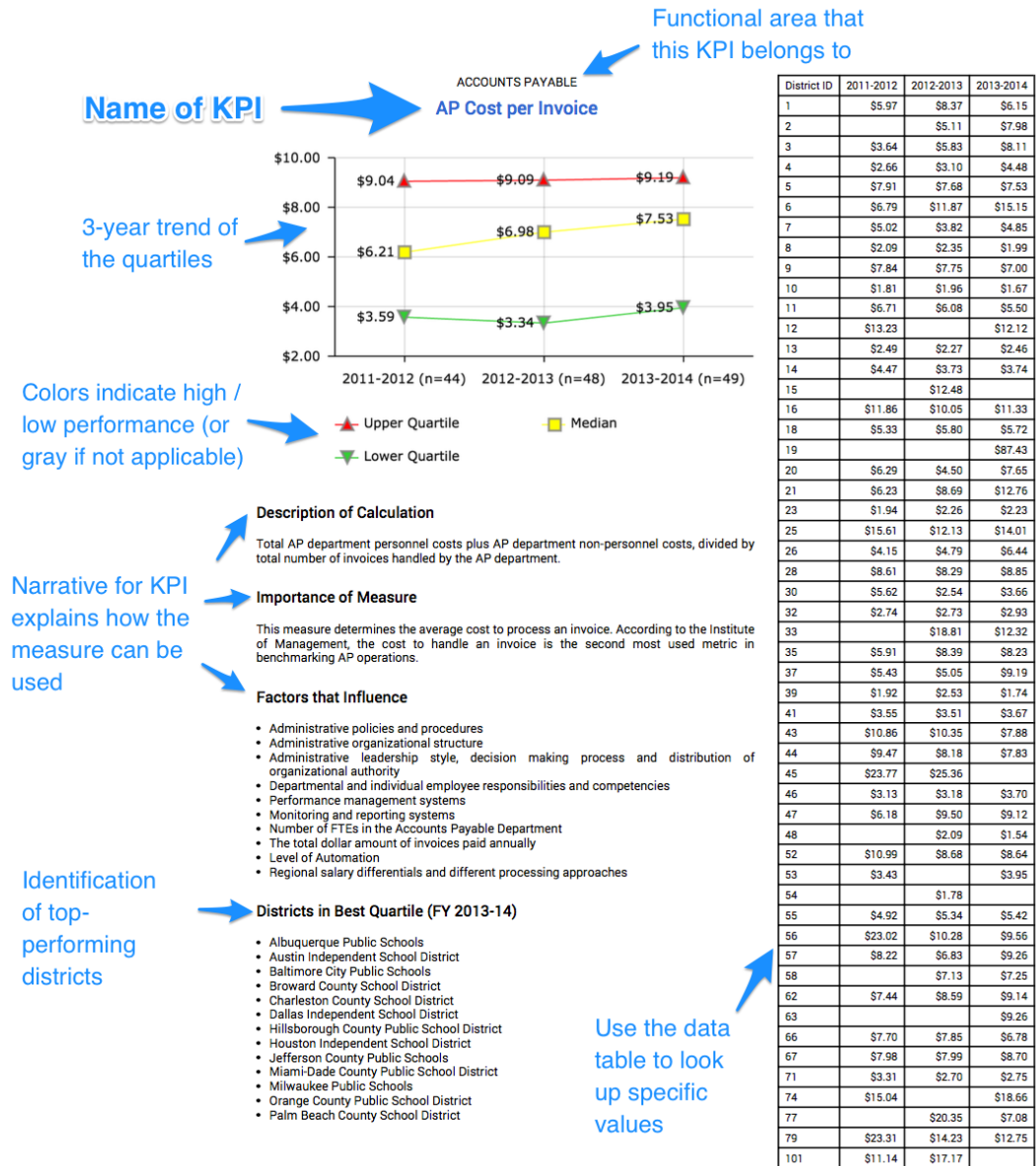
This division is more or less hierarchical, and while it is just one way of many to organizing the KPIs, it is helpful for highlighting those KPIs that are important enough to warrant more attention being paid to them.

A Note on Cost of Living Adjustments

We adjust for **cost of living** in most cost-related measures. Regions where it is more expensive to live, such as San Francisco, Boston, New York City and Washington, D.C., are adjusted downward in order to be comparable with other cities. Conversely, regions where the costs of goods are lower, such as Columbus, OH, and Nashville, TN, are adjusted upwards.

GUIDANCE FOR READING THIS REPORT

Each page of this report shows detailed information for a single KPI measure. The figure below shows the key components.



The quartiles plotted on the chart are reasonable benchmarks (“high, middle, low”) for measuring performance. Showing the multi-year trend is useful for thinking about national trends over time.

Reports from previous years (before the 2015 edition of this report) showed only the latest year of data as a single bar chart for each measure. The new format makes it easier to see the broad trends for a measure. And because the data table is sorted by district ID number, it is also easier to look up a single district’s data.

FREQUENTLY ASKED QUESTIONS

Why are districts in this report identified by ID number instead of district name?

The data tables in this report list districts by their ID number. This is done to create a safe environment so public reporting of the data is done through district numbers, and not by name.

How do I find my district's ID number?

You can contact Bob Carlson at rcarlson@cgcs.org or Jon Lachlan-Hache at jlachlan@cgcs.org and ask for your KPI ID. Your ID is also shown when you log in to ActPoint® KPI (<https://kpi.actpoint.com>).

How do I get the ID numbers for all the other districts?

The ID numbers of other districts are confidential, and we do not share them without the permission of each district. If you would like to identify specific districts that are in your peer group in order to collaborate with them, please contact Bob Carlson at rcarlson@cgcs.org or Jon Lachlan-Hache at jlachlan@cgcs.org.

Districts can share their own ID numbers with others at their own discretion.

Why isn't my data showing? My district completed the surveys.

It is likely that your data was flagged for review or is invalid. To resolve this, log in and check the Surveys section of the website. You should see a message telling you that there are data that needs to be reviewed.

It is also possible that you submitted your data after the publication deadline for this report. To resolve this, log in to ActPoint® KPI (<https://kpi.actpoint.com>) and check the Survey section of the website.

In either case, it may be possible to update your data in the surveys. Once you do, your results will be reviewed and approved by CGCS or TransAct within 24 hours of your submission. You will then be able to view the results online.

Can I still submit a survey? Can I update my data?

You may still be able to submit or edit a survey depending on the survey cycle. Log in to ActPoint® KPI where you will see a message saying "This survey is now closed" if the survey is closed to edits. If you do not see this message, then updates are still allowed for the fiscal year.

If the surveys are still open, any data that is updated will need to be reviewed and approved by CGCS or TransAct before the results can be viewed online. You can expect your data to be reviewed within 24 hours of your submission.

Accounts Payable

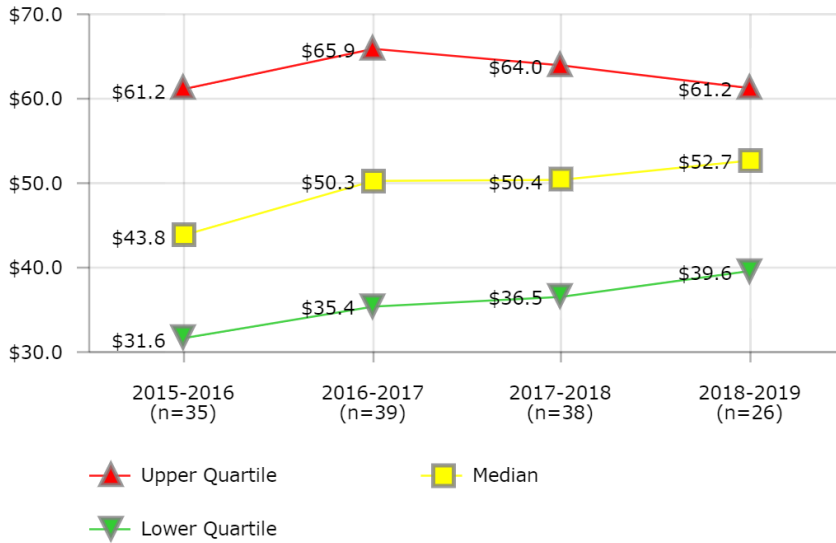
Performance metrics in Accounts Payable (AP) focus on the cost efficiency, productivity, and service quality of invoice processing. Cost efficiency is measured most broadly with **AP Costs per \$100K Revenue**, which evaluates the entire cost of the AP department against the total revenue of the district. This metric is supported by a similar metric, **AP Cost per Invoice**, which compares against the number of invoices processed rather than district revenue.

Productivity is measured by **Invoices Processed per FTE per Month**, and service quality is captured, in part, by **Days to Process Invoices**, **Invoices Past Due at Time of Payment** and **Payments Voided**.

With the above KPIs combined with **staffing** and **electronic invoicing** KPIs, district leaders have a baseline of information to consider whether their AP function:

- Needs better automation to process invoices
- Is overstaffed or has staff that is under-trained or under-qualified
- Should revise internal controls to improve accuracy
- Needs better oversight and reporting procedures

ACCOUNTS PAYABLE
AP Cost per \$100K Revenue



Description of Calculation

Total AP department personnel costs plus AP department non-personnel costs divided by total district operating revenue over \$100,000.

Importance of Measure

This measures the operational efficiency of an Accounts Payable Department.

Factors that Influence

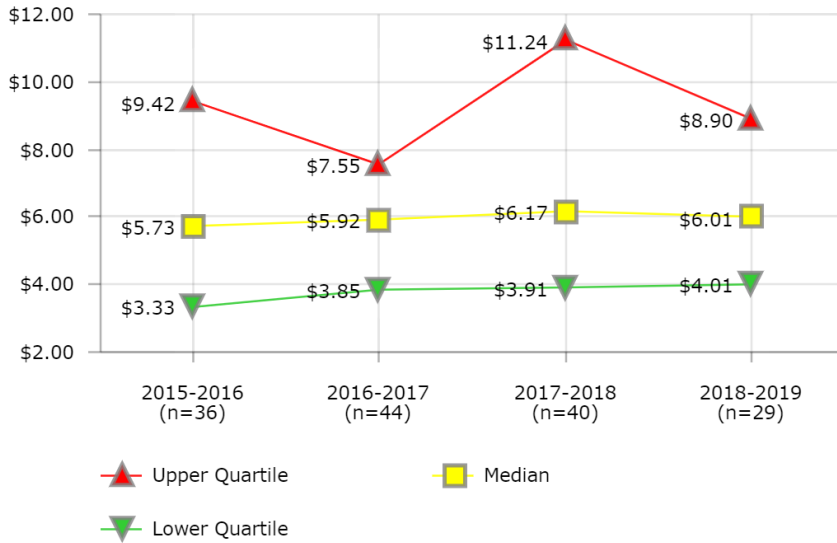
- Administrative policies and procedures
- Administrative organizational structure
- Administrative leadership style, decision making process and distribution of organizational authority
- Departmental and individual employee responsibilities and competencies
- Performance management systems
- Monitoring and reporting systems
- Number of FTEs in the Accounts Payable Department
- The total dollar amount of invoices paid annually
- Level of Automation
- Regional salary differentials and different processing approaches

Districts in Best Quartile (2018-2019)

- Baltimore City Public Schools
- Broward County Public Schools
- Clark County School District
- Miami-Dade County Public Schools
- Milwaukee Public Schools
- Norfolk School District
- Palm Beach County School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1				\$44.4
2	\$122.1		\$133.3	
3	\$38.3	\$69.0		\$51.2
4	\$31.8	\$33.9	\$35.2	\$57.3
7	\$47.2	\$45.4	\$43.8	
8	\$33.9	\$27.3	\$26.1	\$29.7
9	\$31.6	\$35.4	\$36.5	\$33.4
10	\$28.6	\$28.6	\$29.9	
11	\$33.6	\$33.8		
12	\$158.9	\$145.9	\$149.3	\$160.6
13	\$38.0		\$34.7	\$33.3
14	\$46.7	\$60.0	\$60.5	\$57.5
15			\$124.0	
18		\$62.2	\$56.3	\$53.9
20	\$59.4	\$53.5	\$47.5	\$51.5
23			\$50.2	
25	\$36.2		\$35.5	\$141.9
27				\$39.6
28	\$62.8	\$50.5	\$64.0	
30	\$28.6	\$30.6	\$30.7	\$32.9
32	\$29.4	\$28.1	\$31.8	\$32.3
34	\$120.2			
35	\$84.1	\$74.8	\$68.8	\$65.0
37		\$39.2		
39	\$29.1	\$30.4		
40		\$46.2	\$50.4	
41	\$55.1	\$49.6	\$46.0	
43	\$28.0	\$52.7	\$57.6	\$55.1
44	\$61.2	\$68.3	\$67.5	\$61.7
45		\$47.5		
46	\$26.1	\$18.0	\$22.9	\$30.1
47	\$39.7	\$37.0	\$40.7	
48	\$44.9	\$50.3	\$50.4	\$51.4
49	\$43.9	\$65.3		
50		\$93.7	\$56.9	\$61.2
51	\$151.8	\$130.4	\$168.6	\$151.4
53		\$63.3	\$55.6	\$55.3
54	\$13.9		\$15.1	
55	\$47.0	\$44.4	\$45.3	
57		\$51.6	\$50.5	\$46.4
58	\$15.7	\$17.8		
62	\$43.8			
63	\$43.8	\$39.4	\$40.4	\$40.7
67	\$73.4	\$65.7	\$58.2	\$58.2
71	\$46.4	\$47.4	\$40.3	
79		\$104.8	\$105.3	\$83.5
91	\$71.0	\$65.9	\$63.9	
97		\$98.0	\$113.1	
431		\$87.3	\$83.6	

ACCOUNTS PAYABLE
AP Cost per Invoice



District	2015-2016	2016-2017	2017-2018	2018-2019
1		\$5.78		\$6.01
2	\$11.22		\$12.01	
3	\$4.60	\$3.79	\$4.80	\$2.73
4	\$4.67	\$6.47	\$7.07	\$10.61
5			\$24.23	
7	\$5.01	\$4.14	\$3.58	
8	\$2.00	\$1.82	\$1.71	\$1.86
9	\$6.32	\$7.82	\$8.05	\$7.77
10	\$1.51	\$1.67	\$2.87	
11	\$4.38	\$4.24		
12	\$11.74	\$10.68	\$13.11	\$12.66
13	\$2.92	\$2.74	\$2.58	\$2.56
14	\$1.35	\$3.49	\$5.20	\$5.41
15			\$12.10	
16			\$9.93	
18	\$6.62	\$6.67	\$6.37	\$5.95
20	\$11.78	\$13.98	\$30.92	\$36.77
25	\$12.72	\$10.71	\$12.95	\$13.90
27				\$8.90
28	\$9.40	\$4.98	\$6.26	\$7.13
30	\$3.11	\$3.02	\$3.69	\$3.25
32	\$2.57	\$2.31	\$2.02	\$3.18
35	\$8.67	\$7.74	\$7.74	\$7.36
37		\$3.29		
39	\$2.86			
40		\$4.21	\$1.73	\$3.77
41	\$4.89	\$4.73	\$4.92	
43	\$11.77	\$11.90	\$13.96	\$10.54
44	\$13.79	\$7.14	\$10.55	\$5.88
45		\$21.66		
46	\$3.75	\$2.63	\$3.68	\$4.01
47	\$5.69	\$3.59	\$4.14	\$4.53
48	\$1.67	\$1.87	\$2.05	\$2.15
49		\$7.22		
50		\$16.83	\$12.23	\$16.98
51	\$9.45	\$11.72	\$11.93	\$11.27
52		\$3.90		
53		\$5.52	\$5.18	\$5.58
54	\$2.62	\$3.95	\$4.22	
55	\$5.78	\$5.91	\$6.09	
57	\$5.83	\$6.13	\$6.58	\$7.87
58	\$6.62	\$7.37		
62	\$10.15			
63	\$8.01	\$6.01	\$6.06	\$5.59
66	\$4.25	\$7.37		\$6.70
67	\$9.60	\$8.11	\$5.82	\$6.09
71	\$3.56	\$6.06	\$3.39	
74			\$70.98	
79		\$17.99		
91	\$6.53	\$5.94	\$6.25	
97		\$7.30	\$7.46	
431		\$4.02	\$4.94	

Description of Calculation

Total AP department personnel costs plus AP department non-personnel costs, divided by total number of invoices handled by the AP department.

Importance of Measure

This measure determines the average cost to process an invoice. According to the Institute of Management, the cost to handle an invoice is the second most used metric in benchmarking AP operations.

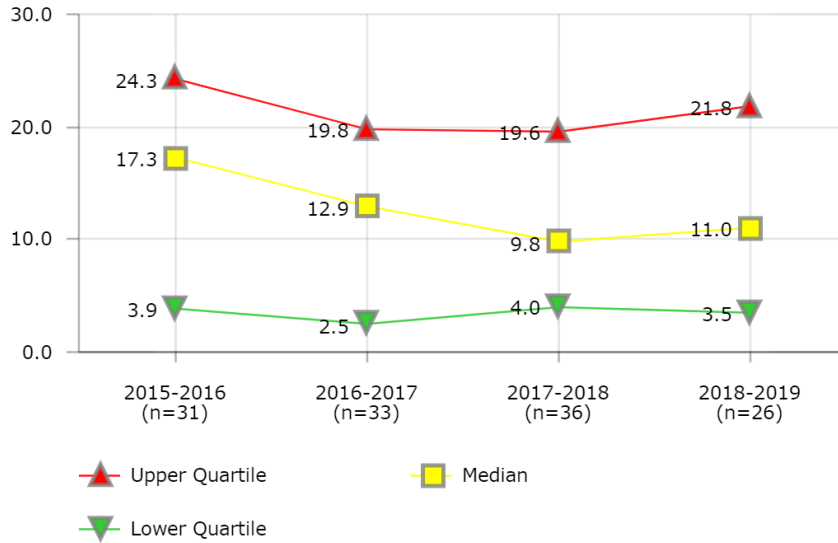
Factors that Influence

- Administrative policies and procedures
- Administrative organizational structure
- Administrative leadership style, decision making process and distribution of organizational authority
- Departmental and individual employee responsibilities and competencies
- Performance management systems
- Monitoring and reporting systems
- Number of FTEs in the Accounts Payable Department
- The total dollar amount of invoices paid annually
- Level of Automation
- Regional salary differentials and different processing approaches

Districts in Best Quartile (2018-2019)

- Baltimore City Public Schools
- Broward County Public Schools
- Fort Worth Independent School District
- Miami-Dade County Public Schools
- Milwaukee Public Schools
- Orange County Public School District
- Palm Beach County School District
- St. Paul Public Schools

ACCOUNTS PAYABLE
Invoices - Days to Process



Description of Calculation

Aggregate number of days to process all AP invoices, from date of invoice receipt by the AP department to the date of payment post/ check release, divided by the total number of invoices handled by the AP department.

Importance of Measure

This measures the efficiency of the payment process.

Factors that Influence

- Automation
- Size of district
- Administrative policies

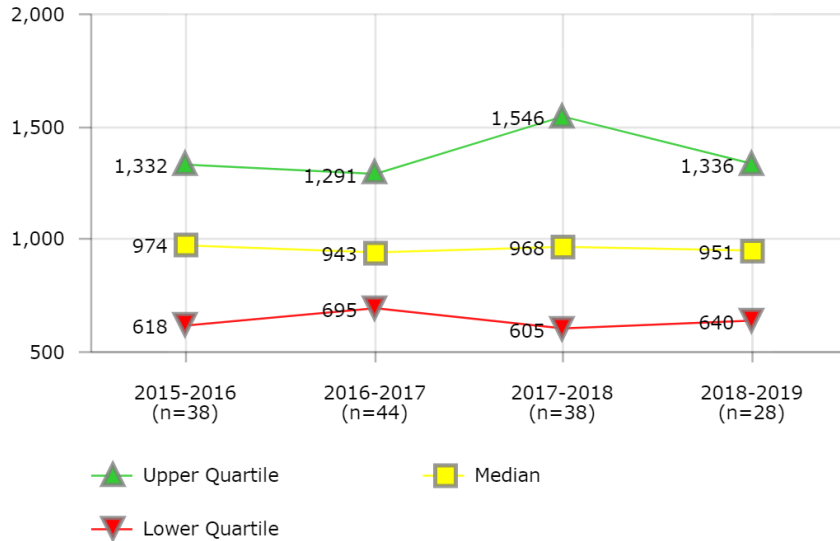
Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Broward County Public Schools
- Charlotte-Mecklenburg Schools
- Detroit Public Schools
- Fort Worth Independent School District
- Omaha Public School District
- Shelby County Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1				25.2
3	14.0	10.3	12.4	11.7
4	19.7	19.7	20.0	15.9
5			0.0	
7	16.7	5.2	5.1	
8	6.9	7.6	6.7	6.8
9	20.0	20.6	7.7	7.8
10	1.4	3.4	5.5	
11	19.7	19.0		
12	18.1	15.5	9.6	10.4
13	2.0	2.2	2.0	2.0
14	9.2		0.0	0.0
15			5.2	
16			6.0	
18	20.4	3.6	4.0	3.5
20		32.6	34.1	79.6
23			10.0	
25	53.3	84.8	60.2	36.3
27				23.3
28			10.1	12.4
30	10.0	10.0	10.0	10.0
32	1.0	0.7		
35	21.2	23.0	27.3	24.7
37		2.5		
40		19.0	0.0	0.0
41			21.4	
44	0.4	0.3		
45	57.4	13.7		
46	64.9	46.0	53.6	41.9
47	24.3		14.0	21.8
48	17.3	16.8	15.0	14.9
50		0.0	5.2	0.0
51	0.7		1.0	7.7
53		1.1	4.0	4.2
54	0.6	0.7	3.4	
55	3.9	3.5	3.5	3.4
57	46.0	44.2		
58	52.3	41.8		
62	8.4			
63	34.7	34.0	32.3	14.5
66	1.3	1.3		1.5
67	43.2		31.2	13.3
71	8.6	2.3	10.7	
74			30.0	
79		14.8		
91	18.6	19.8	19.2	
97			0.0	
431		12.9	14.5	

ACCOUNTS PAYABLE

Invoices Processed per FTE per Month



District	2015-2016	2016-2017	2017-2018	2018-2019
1		754		709
2	618		603	
3	1,084	1,390	1,132	2,382
4	1,167	763	799	784
5			258	
7	1,187	1,429	1,506	
8	2,516	2,590	2,745	2,937
9	826	723	752	752
10	2,618	2,613	1,626	
11	1,159	975		
12	450	504	469	466
13	1,482	1,533	1,651	1,716
14	1,678	903	605	579
15			345	
16			421	
18	1,076	1,149	1,229	1,275
20	493	446		
25	359	353	327	326
27				516
28	645	1,119	1,176	1,088
30	1,980	2,206	1,822	2,211
32	2,010	2,196	2,722	1,660
35	989	1,098	1,047	1,091
37		1,120		
39	1,332			
40		752	2,043	1,099
41	1,149	978	956	
43	611	481	477	620
44	289	588	401	630
45	225	292		
46	1,541	1,904	1,717	1,397
47	839	1,112	1,124	1,123
48	2,707	2,764	2,665	2,719
49		823		
50		495	635	525
51	730	580		650
52	82	1,510		
53		1,056	950	898
54	2,694	2,693	2,151	
55	870	841	861	
57	959	1,193	1,128	857
58	1,202	985		
62	558			
63	824	1,032	1,049	1,169
66	764	730		866
67	614	667	979	1,004
71	1,332	910	1,546	
74			286	
79		375		
91	707	734	679	
97		640	755	
431		898	768	

Description of Calculation

Total number of invoices handled by the AP department, divided by total number of AP staff (FTEs), divided by 12 months.

Importance of Measure

This measure is a major driver of accounts payable department costs. Lower processing rates may result from handling vendor invoices for small quantities of non-repetitive purchases; higher processing rates may result from increased technology using online purchasing and invoice systems to purchase and pay for large quantities of items from vendors.

Factors that Influence

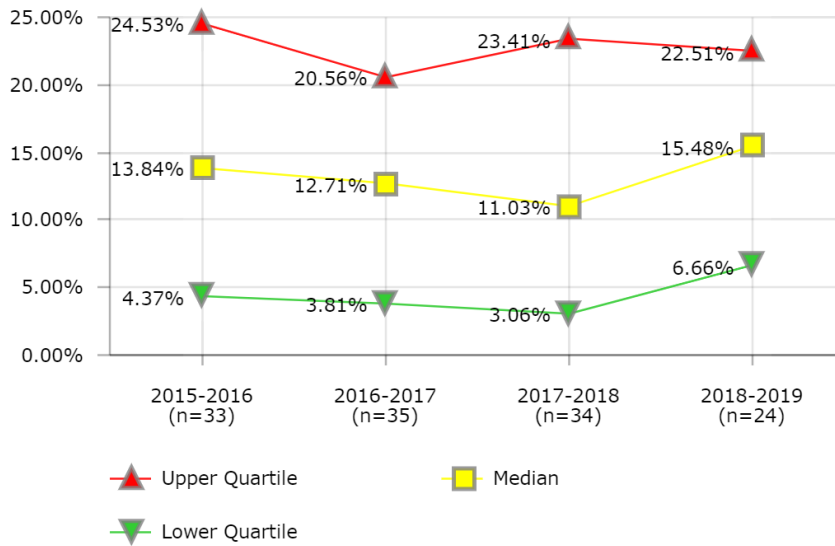
- Administrative organizational structure
- Administrative leadership style, decision making process and distribution of organizational authority
- Departmental and individual employee responsibilities and competencies
- Performance management systems
- Monitoring and reporting systems
- Number of FTEs in the Accounts Payable Department
- The number of invoices paid annually
- Level of automation

Districts in Best Quartile (2018-2019)

- Baltimore City Public Schools
- Broward County Public Schools
- Miami-Dade County Public Schools
- Milwaukee Public Schools
- Orange County Public School District
- Palm Beach County School District
- St. Paul Public Schools

ACCOUNTS PAYABLE

Invoices Past Due at Time of Payment



Description of Calculation

Number of invoices past due at time of payment, divided by total number of invoices handled by the AP department.

Importance of Measure

Minimizing the number of payments that are past due should be a crucial mission of the accounts payable department.

Factors that Influence

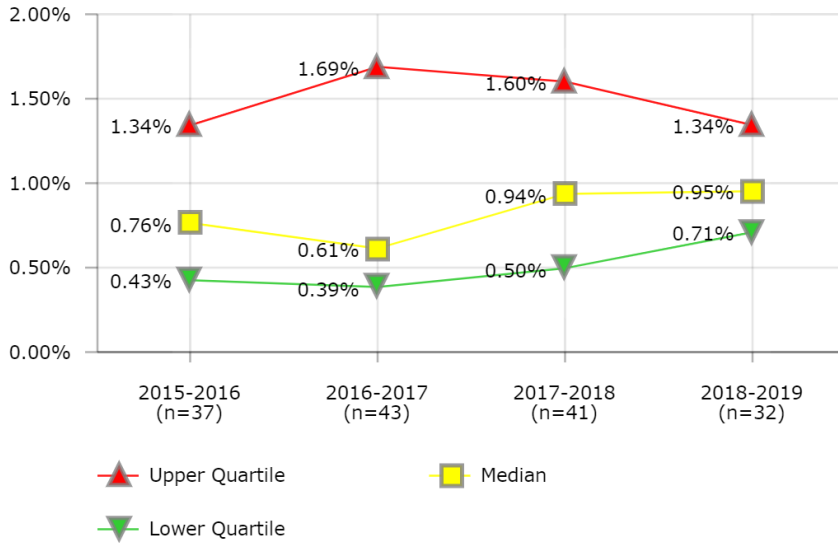
- Process controls
- Department workload management
- Overtime policy

Districts in Best Quartile (2018-2019)

- Charlotte-Mecklenburg Schools
- Des Moines Public Schools
- Detroit Public Schools
- Omaha Public School District
- Palm Beach County School District
- Shelby County Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1				24.39%
2	1.50%		1.85%	
3	5.79%	3.83%	6.47%	7.29%
4	17.16%	15.59%	19.65%	12.39%
7	4.60%	3.81%	2.55%	
8	6.08%	5.54%	4.73%	2.11%
9	17.01%	19.40%	20.46%	21.70%
10	2.79%	3.09%	5.15%	
11	21.13%	14.33%		
12	1.19%	2.76%	1.31%	5.25%
14	3.71%	3.85%	1.53%	20.49%
15			30.53%	
16			39.87%	
18	24.53%	28.14%	3.06%	2.61%
20		33.63%	24.12%	
23			0.49%	
25	71.57%	88.21%		69.68%
27				18.35%
28		20.01%	12.13%	19.25%
32	18.08%	12.71%	1.34%	6.76%
35	17.39%	19.20%	24.54%	23.32%
37		10.00%		
39	21.71%	10.00%		
40		20.56%	0.10%	15.00%
41	100.00%	27.02%	25.51%	
44	2.22%	1.26%		
45	75.27%			
46	46.83%	47.33%	52.42%	54.31%
47	54.42%	35.48%	65.39%	50.40%
48	0.50%	0.43%	0.42%	
50		9.40%	4.22%	6.56%
51	1.05%		25.17%	24.77%
52	5.00%		9.92%	
53		12.79%	14.74%	15.96%
54	41.28%		8.34%	
55	4.37%	6.92%	7.49%	5.18%
57	42.31%	23.78%	14.65%	17.83%
58	5.64%	1.77%		
62	39.64%			
63	13.84%	13.12%	13.26%	10.00%
66	1.69%	1.70%		2.00%
67	22.12%	25.07%	14.20%	11.00%
71	6.56%	0.87%	8.86%	
79		9.25%		
91	13.66%	15.80%	13.92%	
431		3.45%	23.41%	

ACCOUNTS PAYABLE
Payments Voided



District	2015-2016	2016-2017	2017-2018	2018-2019
1		1.18%		1.38%
2	3.10%		2.78%	
3	0.50%	0.53%	0.78%	1.06%
4	0.48%	0.41%	0.50%	1.19%
7	2.49%	2.44%	0.34%	
8	0.44%	0.36%	0.32%	0.43%
9	0.61%	0.74%	0.63%	0.72%
10	0.43%	0.61%	0.78%	
11	0.35%	0.47%		
12	0.76%	0.17%	0.25%	0.30%
13	0.67%	0.68%	0.90%	0.63%
14	0.12%	0.07%	0.10%	0.16%
15			0.99%	
16			1.71%	
18	0.83%	1.20%	1.15%	1.19%
19		1.81%	1.60%	1.88%
20	2.66%	1.69%	1.51%	1.28%
23			0.96%	
25	2.42%	2.27%	1.83%	1.20%
27				0.56%
28		1.56%	1.74%	0.85%
30	0.30%	0.32%	0.34%	0.83%
32	1.19%	2.90%	2.22%	1.38%
34	1.08%			
35	0.24%	0.24%	0.81%	0.74%
39	0.32%	1.99%		
40		0.15%	0.13%	0.09%
41	2.34%		2.31%	
43	1.08%	0.59%	0.74%	1.43%
44	1.37%	0.14%	0.97%	0.83%
45	0.68%	0.59%		
46	2.39%	2.45%	1.05%	1.44%
47	0.09%	0.05%	0.06%	0.05%
48	1.70%	2.97%		3.11%
49		0.88%	0.94%	0.84%
50		2.06%	1.03%	1.13%
51	1.12%	1.38%		4.81%
52	0.16%	0.55%	0.19%	
53		0.68%	0.78%	0.82%
54	1.19%	4.37%	0.52%	
55	1.49%	1.87%	1.67%	1.84%
57	0.99%	0.47%	7.46%	0.70%
58	0.41%	0.41%		
63	1.07%	1.09%	0.95%	0.75%
66	0.50%	0.46%		1.31%
67	1.34%		1.69%	1.18%
71	0.64%	0.15%		
74			1.01%	
79		0.98%	0.03%	
91	0.33%	0.54%	0.39%	
97		0.09%	1.76%	
431		0.39%	0.66%	

Description of Calculation

Number of payments voided, divided by total number of AP transactions (payments).

Importance of Measure

This measure reflects processing efficiencies and the degree of accuracy. Voided checks are usually the result of duplicate payments or errors. A high percentage of duplicate payments may indicate a lack of controls, or that the master vendor files need cleaning, creating the potential for fraud.

Factors that Influence

- Administrative policies and procedures
- Administrative organizational structure
- Administrative leadership style, decision making process and distribution of organizational authority
- Departmental and individual employee responsibilities and competencies
- Performance management systems
- Monitoring and reporting systems
- Number of FTEs in the Accounts Payable Department
- The total number of checks written annually
- Level of automation

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Broward County Public Schools
- Cleveland Metropolitan School District
- Des Moines Public Schools
- Fort Worth Independent School District
- Metropolitan Nashville Public Schools
- Norfolk School District
- Palm Beach County School District

Cash Management

These performance metrics can help a district assess their cash management. Cash management relies upon *well-controlled cash-flow practices*. Performance metrics that indicate healthy cash management include **Months below Target Liquidity Level** and **Short-Term Loans per \$100K Revenue**.

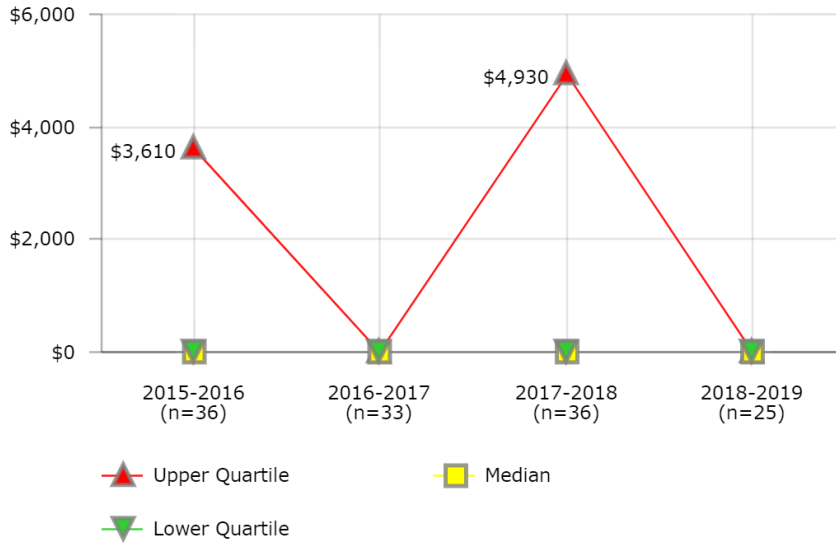
Measures that look at *investment yield* include **Investment Earnings per \$100K Revenue** and **Investment Earnings as Percent of Cash/Investment Equity**.

When evaluating cash- management performance, the following conditions should be considered among the influencing factors:

- Revenue inflows and expenditure outflows, and the accuracy of cash flow projections
- School board and administrative policies requiring internal controls and transparency
- Accounting standards
- Borrowing eligibility and liquidity
- State laws and regulations

CASH MANAGEMENT

Cash Flow - Short-Term Loans per \$100K Revenue



Description of Calculation

Total amount borrowed in short-term loans (with a repayment period of one year or less), divided by total district operating revenue over \$100,000

Importance of Measure

This measure identifies the degree to which districts need to borrow money to meet cash flow needs. Short-term borrowing is defined here as any loan with a repayment term of less than one year.

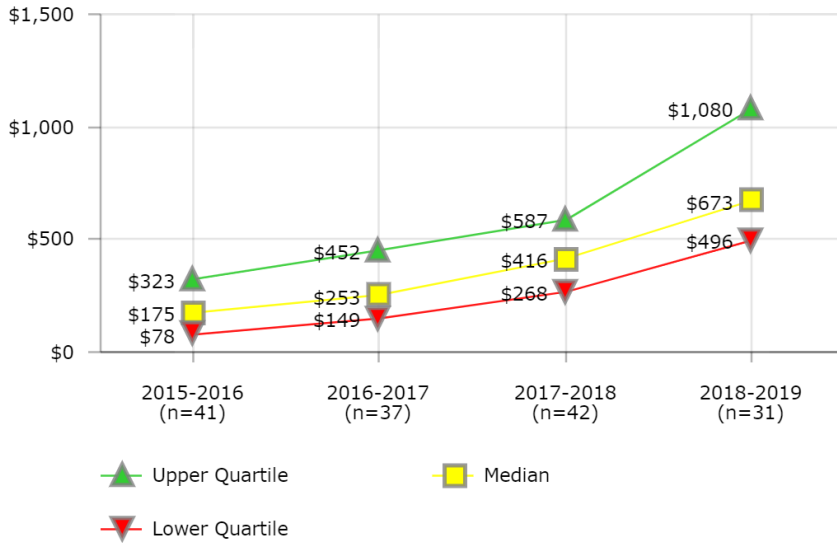
Factors that Influence

- The timing of revenue inflows and expenditure outflows and the arbitrage ability to cover the borrowing
- Ability to meet required spending for tax-exempt borrowing eligibility
- State law may restrict or prohibit certain types of short-term borrowing

District	2015-2016	2016-2017	2017-2018	2018-2019
1				\$0
2	\$0		\$0	
3	\$0	\$0		\$0
4	\$0	\$0	\$0	\$0
7	\$0		\$0	
8	\$6,109	\$5,671	\$5,425	\$5,456
9	\$0	\$0	\$0	\$0
10	\$0	\$0	\$0	
11	\$0	\$0		
12	\$0	\$0	\$0	\$0
13	\$4,901		\$4,435	\$5,702
14	\$0	\$0	\$0	\$0
15			\$8,297	
20	\$0	\$0	\$0	\$0
25	\$2,319		\$2,124	\$7,830
27				\$0
28	\$0	\$0	\$7,102	
30	\$22,656	\$20,640	\$20,982	\$21,141
32	\$9,303	\$8,325	\$7,453	\$9,319
34	\$0			
35	\$0	\$0	\$0	\$0
37	\$16,921	\$20,493		
39	\$0	\$0		
41	\$0	\$0	\$0	
43	\$0	\$0	\$0	\$0
44	\$129	\$0	\$8,530	\$0
46	\$0	\$0	\$0	\$0
47		\$0	\$0	
48	\$0	\$0	\$0	\$0
49	\$0	\$0		
50		\$0	\$0	\$0
51	\$0	\$0	\$0	\$0
53		\$0	\$0	\$0
54	\$18,433		\$16,876	
55	\$0	\$0	\$0	
57	\$0	\$0	\$0	\$0
58	\$22,807	\$11,154	\$10,221	
62	\$0			
63	\$9,035	\$8,630	\$0	\$0
67	\$0	\$0	\$0	\$0
71	\$9,364	\$2,042	\$1,879	
79		\$0	\$0	\$0
91	\$0		\$0	
97		\$10,610	\$11,072	
431				\$0

CASH MANAGEMENT

Investment Earnings per \$100K Revenue



District	2015-2016	2016-2017	2017-2018	2018-2019
1				\$411
2	\$6		\$5	
3	\$149	\$632		\$464
4	\$58	\$127	\$343	\$0
7	\$325	\$149	\$52	
8	\$175	\$274	\$540	\$1,074
9	\$242	\$174	\$455	\$1,142
10	\$196		\$350	
11	\$333			\$1,261
12	\$311	\$233	\$476	\$1,232
13	\$149		\$364	\$266
14	\$78	\$172	\$411	\$1,267
15			\$24	
16	\$498			\$1,929
18		\$351	\$635	
20	\$132	\$155	\$239	\$589
23			\$587	
25	\$18		\$61	\$659
27				\$33
28	\$76	\$148	\$193	
30	\$394	\$500	\$484	\$463
32	\$130	\$253	\$554	\$1,064
34	\$317			
35	\$416	\$286	\$487	\$1,843
37	\$146	\$452		
39	\$323	\$647		
40		\$546	\$1,045	
41	\$395	\$636	\$1,136	
43	\$90	\$332		
44	\$445	\$360	\$412	\$593
46	\$62	\$118	\$284	\$611
47	\$15	\$11		
48	\$2,042	\$1,708	\$2,132	
49	\$5	\$31		
50		\$6	\$120	\$154
51	\$1	\$105	\$675	\$1,125
53		\$209	\$197	\$562
54			\$268	
55	\$65	\$99	\$123	
56	\$314		\$898	\$985
57		\$318	\$277	\$673
58	\$39	\$67	\$150	
61	\$129		\$323	\$496
62	\$136			\$1,080
63	\$154	\$188	\$437	\$1,030
67	\$304	\$460	\$666	\$766
71	\$199	\$355	\$474	
77	\$341		\$461	\$631
79		\$204	\$415	\$770
91	\$476	\$552	\$1,026	
97		\$223	\$284	
101	\$200		\$417	\$626
431		\$566	\$1,258	
1728	\$246	\$446	\$839	\$1,054

Description of Calculation

Total investment earnings, divided by total district operating revenue over \$100,000.

Importance of Measure

This indicates the rate of return on cash and investment assets. It reflects the degree to which the district uses its available assets to build value.

Factors that Influence

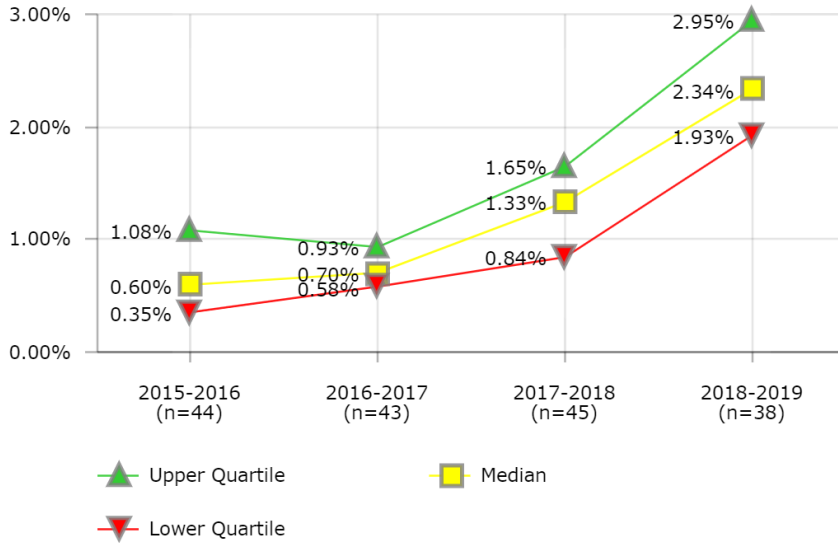
- Revenue types
- Types of receipt percentages
- Investments internal or external
- Investment policy

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Clark County School District
- Columbus Public Schools
- Des Moines Public Schools
- Los Angeles Unified School District
- Oklahoma City Public Schools
- Sacramento City Unified School District
- San Diego Unified School District

CASH MANAGEMENT

Investment Earnings as Percent of Cash/Investment Equity



Description of Calculation

Total investment earnings, divided by total cash and investment equity.

Importance of Measure

This indicates the rate of return on cash and investment assets. It reflects the degree to which the district uses its available assets to build value.

Factors that Influence

- Investment rate of return
- Investment policy

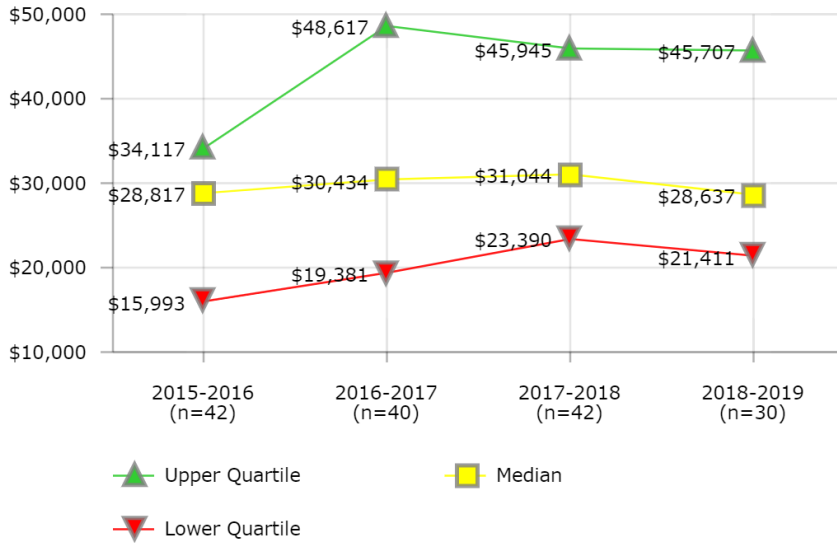
Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Clark County School District
- Cleveland Metropolitan School District
- Columbus Public Schools
- Des Moines Public Schools
- Duval County Public Schools
- Miami-Dade County Public Schools
- Milwaukee Public Schools
- Sacramento City Unified School District
- San Francisco Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1		0.93%		2.00%
2	1.32%		1.07%	
3	0.93%	1.65%		2.58%
4	0.27%	2.48%	1.36%	0.00%
5			0.52%	
7	1.39%	0.90%	0.29%	
8	0.56%	0.70%	1.48%	2.53%
9	0.80%	0.60%	1.38%	2.98%
10	0.95%		1.73%	
11	2.41%			2.22%
12	0.95%	0.72%	1.93%	5.00%
13	0.45%	0.76%	1.38%	0.91%
14	0.15%	0.27%	0.61%	2.13%
15			0.08%	
16	0.69%		1.65%	2.42%
18	0.43%	1.61%	2.72%	
19			1.15%	2.57%
20	0.43%	0.59%	0.84%	1.93%
25	1.14%	0.56%	1.49%	2.54%
27				0.34%
28	0.37%	0.73%	0.79%	6.25%
30	3.46%	3.92%	3.68%	3.46%
32	0.64%	0.80%	1.88%	3.72%
34	0.51%			
35	1.42%	0.70%	1.06%	3.86%
37	0.39%	0.63%		
39	0.33%	0.59%		
40		0.93%	1.33%	2.35%
41	1.16%	0.79%	1.59%	
43	0.56%	1.25%		
44	1.99%	2.25%	5.49%	4.00%
45	0.05%			
46	0.30%	0.53%		
47	0.17%	0.44%	2.68%	0.32%
48	1.71%	1.50%	1.89%	2.68%
49	0.11%	0.58%	0.74%	1.51%
50		0.04%	0.56%	0.80%
51	0.00%	0.20%	1.10%	1.93%
52	0.14%	0.33%		
53		0.64%	0.64%	2.32%
54			1.05%	
55	0.59%	1.01%	1.44%	
56	0.74%			2.13%
57	0.85%	0.69%	0.88%	3.08%
58	0.28%	0.33%	0.66%	
61	0.41%		0.80%	1.95%
62	0.43%		2.05%	2.98%
63	0.61%	0.70%	1.03%	2.25%
66	0.66%	0.83%		1.87%
67	1.07%	1.42%	1.83%	2.67%
71	0.33%	0.57%	0.89%	
76		0.66%		2.40%
77	1.09%		1.45%	2.95%
79		0.55%	1.04%	1.94%
91	1.49%	1.34%	1.61%	
97		0.81%	0.84%	
101			1.19%	1.50%
431		0.61%	1.75%	
1728		0.71%	1.40%	1.92%

CASH MANAGEMENT

Cash/Investment Equity per \$100K Revenue



District	2015-2016	2016-2017	2017-2018	2018-2019
1				\$20,570
2	\$434		\$440	
3	\$15,993	\$38,365		\$17,994
4	\$20,972	\$5,120	\$25,127	
7	\$23,361	\$16,562	\$17,504	
8	\$31,317	\$39,158	\$36,467	
9	\$30,109	\$29,148	\$33,034	\$38,319
10	\$20,701	\$17,401	\$20,231	
11	\$13,858	\$18,616		\$56,672
12	\$32,666	\$32,213	\$24,609	\$24,651
13	\$33,346		\$26,450	\$29,088
14	\$53,047	\$63,874	\$67,330	\$59,579
15			\$29,338	
16	\$72,732			\$79,710
18		\$21,875	\$23,390	\$951
20	\$31,078	\$26,385	\$28,427	\$30,501
23			\$19,249	
25	\$1,586		\$4,067	\$25,974
27				\$9,635
28	\$20,496	\$20,220	\$24,452	
30	\$11,396	\$12,756	\$13,155	\$13,385
32	\$20,366	\$31,721	\$29,440	\$28,583
34	\$62,672			
35	\$29,394	\$40,555	\$45,945	\$47,772
37	\$37,913	\$71,723		
39	\$97,026	\$109,156		
40		\$58,508	\$78,436	
41	\$34,117	\$80,720	\$71,339	
43	\$15,898	\$26,501	\$29,384	\$24,405
44	\$22,320	\$16,034	\$7,506	\$14,799
46	\$20,902	\$22,353		
47	\$8,535	\$2,400		
48	\$119,392	\$114,250	\$113,052	
49	\$3,988	\$5,360		
50		\$15,575	\$21,177	\$19,302
51	\$66,791	\$51,150	\$61,140	\$58,390
53		\$32,474	\$30,684	\$24,224
54	\$10,324	\$25,705	\$25,589	
55	\$11,079	\$9,754	\$8,528	
56	\$42,704		\$60,303	\$46,189
57		\$46,084	\$31,404	\$21,805
58	\$14,186	\$20,147	\$22,722	
61	\$31,187		\$40,442	\$25,408
62	\$31,776			\$36,299
63	\$25,341	\$26,849	\$42,440	\$45,707
67	\$28,240	\$32,269	\$36,311	\$28,691
71	\$61,127	\$62,144	\$53,552	
77	\$31,382		\$31,706	\$21,411
79		\$37,430	\$39,867	\$39,594
91	\$31,926	\$41,312	\$63,595	
97		\$27,604	\$33,691	
101	\$27,164		\$34,948	\$41,828
431		\$93,295	\$71,714	
1728	\$61,813	\$62,496	\$60,129	\$55,000

Description of Calculation

Total cash and investment equity, divided by total district operating revenue over \$100,000.

Importance of Measure

This measure indicates the total amount of cash and investment equity relative to annual district revenue.

Factors that Influence

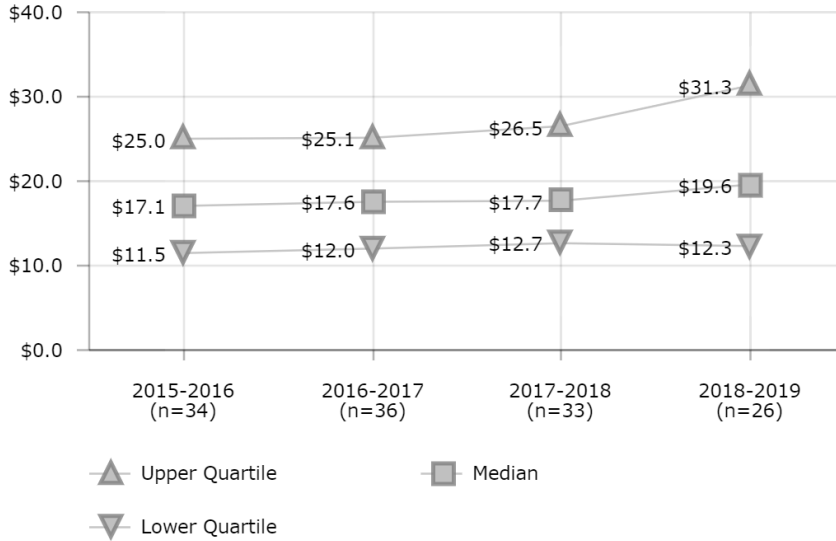
- Amount of funds available for investment
- Fund balance

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Columbus Public Schools
- Long Beach Unified School District
- Los Angeles Unified School District
- Oklahoma City Public Schools
- San Diego Unified School District
- St. Louis City Public School District
- Stockton Unified School District

CASH MANAGEMENT

Treasury Staffing Cost per \$100K Revenue



Description of Calculation

Total Treasury personnel costs, divided by total district operating revenue over \$100,000.

Importance of Measure

This measure helps evaluate staffing costs.

Factors that Influence

- Number and wages of Treasury personnel

District	2015-2016	2016-2017	2017-2018	2018-2019
1				\$24.7
3	\$11.0	\$19.5		\$19.1
4	\$13.1	\$13.7	\$19.9	\$20.1
7	\$25.0	\$27.8	\$32.3	
8	\$15.0	\$15.2	\$14.9	\$15.5
9	\$12.7	\$11.6	\$14.7	\$10.2
10	\$14.0	\$13.6	\$11.9	
11	\$3.2	\$2.5		
12	\$135.6	\$136.2	\$135.6	\$147.4
13	\$19.1		\$22.3	\$12.4
14	\$4.1	\$4.2	\$4.2	\$4.6
18		\$12.5	\$14.0	\$13.0
20	\$373.5	\$321.6		\$345.0
23			\$17.7	
25	\$22.5		\$29.3	\$107.6
27				\$5.0
28	\$15.6		\$2.5	
30	\$7.4	\$7.9	\$8.2	\$8.5
32	\$26.1	\$25.4	\$23.5	\$24.6
34	\$35.3			
35	\$20.3	\$15.7	\$12.7	\$12.3
37	\$20.0	\$19.3		
39	\$19.4	\$20.5		
40		\$14.9	\$16.2	
41	\$42.5	\$40.0	\$38.2	
43	\$14.3	\$18.9	\$33.6	\$33.0
44	\$22.0	\$24.0	\$25.3	\$30.4
46	\$17.2	\$14.6	\$14.1	\$11.2
48	\$17.0	\$16.2	\$15.9	\$14.3
49	\$4.4	\$7.5		
50		\$49.6	\$36.4	\$34.6
51	\$134.4	\$112.3		\$126.9
53		\$1.6		\$4.8
54	\$11.5		\$9.2	
55	\$5.9	\$5.9	\$5.8	
57		\$24.9	\$30.6	\$24.0
58	\$9.4	\$10.2	\$9.1	
62	\$48.5			
63	\$25.8	\$24.4	\$26.2	\$26.1
67	\$15.3	\$14.5	\$15.7	\$16.3
71	\$17.1	\$19.2	\$26.9	
79		\$20.6	\$20.6	\$31.3
91	\$4.8	\$2.4	\$2.4	
97		\$32.6	\$26.5	
431		\$29.7	\$25.6	

Compensation

Performance metrics in compensation evaluate the cost efficiency and productivity of the payroll department. Cost efficiency is broadly represented by the two measures **Payroll Cost per Pay Check** and **Payroll Cost per \$100K Spend**, which both evaluate the total costs of the Payroll department relative to workload. Productivity is broadly represented by **Pay Checks Processed per FTE per Month**, which is also a cost driver of payroll.

Because compensation involves high volumes of regular and predictable transactions, most cost efficiencies can be realized by expanding the use of existing tools such as employee direct deposit and employee self-service modules. This is captured in part by the measures **Direct Deposit Rate** and **Personnel Record Self-Service Usage per District FTE**.

Conversely, districts that underutilize modern automation systems could see an increase in **Pay Check Errors per 10K Payments** and increased **W-2 Correction Rates (W-2c's)** due to the manual effort required, as well as an excessive level of **Overtime Hours per Payroll Employee**. **Percent of Off-Cycle Payroll Checks** may also indicate lower productivity, as this may increase the workload of the Payroll department staff.

These service level, productivity, and efficiency measures should be considered in combination, and provide district leaders with a baseline of information to determine whether their payroll function:

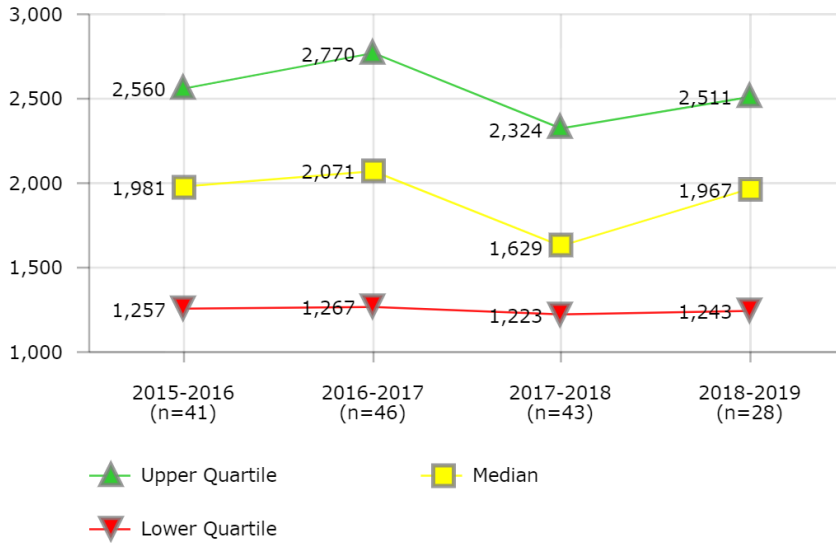
- Needs better automation to improve accuracy and reduce workload
- Should consider switching to software that is more accurate and efficient
- Has problems with time management or workload management, or should have clearer policies around timelines
- Has staff that is under-skilled or under-trained
- Should adopt a policy to increase direct deposits

Additionally, the following factors should be considered when evaluating performance levels:

- Number of contracts requiring compliance
- Frequency of payrolls
- Complexity of state/local reporting requirements

COMPENSATION

Pay Checks Processed per FTE per Month



Description of Calculation

Total number of pay checks processed by Payroll department, divided by total number of Payroll staff (FTEs), divided by 12 months.

Importance of Measure

This measure is a driver of a payroll department's costs. Lower processing rates may result from a low level of automation, high pay check error rates, or high rates of off-cycle pay checks that must be manually processed. Higher processing rates may be the result of increased automation and highly competent staff.

Factors that Influence

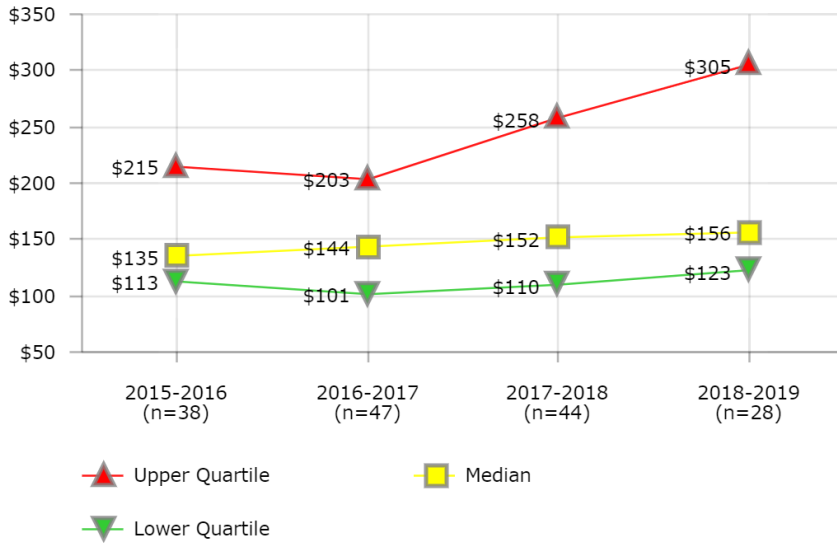
- Direct deposit participation rate
- Pay check error/correction rate
- Staffing levels

Districts in Best Quartile (2018-2019)

- Baltimore City Public Schools
- Miami-Dade County Public Schools
- Milwaukee Public Schools
- Omaha Public School District
- Orange County Public School District
- Palm Beach County School District
- Shelby County Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		564		
2	1,803		1,430	
3	1,135	1,247	1,250	142
4	1,333	1,512	1,503	1,548
5		828	1,031	
7	1,301	1,327	1,259	
8	2,686	2,963	2,996	3,007
9	2,689	2,603	2,317	2,499
10	2,508	2,374	2,324	
11	944	1,267		
12	750	744	749	717
13	4,305	4,467	5,048	
14	1,887	2,371	1,468	2,130
15			652	
16			1,028	
18	2,924	4,112	2,504	2,631
20	981	1,515	1,649	1,298
23			1,629	
25	2,040	2,245	2,105	2,343
27		2,259	2,166	1,846
28	2,181	1,823	1,852	1,996
30	3,439	3,657	3,514	3,493
32	4,662	4,618	4,800	4,497
34	1,061			
35	1,352	1,167	1,197	1,369
37	1,064	988	922	
39	4,558	3,752		
40		1,082	1,188	1,170
41	1,652	1,779	1,594	
43	1,981	2,033	2,167	2,109
44	1,297	1,220	1,103	1,070
45	1,542	1,528		
46	2,560	2,770	2,688	2,720
48	2,330	2,276	2,562	2,524
49	2,155	2,114		2,429
50		1,565	1,491	1,825
51	2,123	1,953	1,950	1,939
52	1,105	3,553		
53	2,247	2,238	2,128	2,154
54	3,611	3,389	3,320	
55	2,953	2,978	2,778	
57	1,257	1,486	1,564	1,661
58	3,379	3,258		
62	813		980	
63	1,250	1,081	1,234	1,022
66	2,182	2,198		2,800
67	1,342	1,309	1,362	1,189
71	1,182	1,246	1,223	
74			848	
76		1,099		
79				1,125
91	2,021	2,109	2,037	
97		6,259	3,427	
431		2,125	2,121	

COMPENSATION
Payroll Cost per \$100K Spend



District	2015-2016	2016-2017	2017-2018	2018-2019
1		\$144		
2	\$159		\$202	
3	\$283	\$296	\$241	
4	\$215	\$301	\$319	\$312
5		\$118	\$119	
7	\$123	\$128	\$133	
8	\$134	\$131	\$124	\$113
9	\$103	\$91	\$108	\$123
10	\$103	\$101	\$114	
11	\$171	\$157		
12	\$535	\$415	\$317	\$348
13	\$79	\$73	\$64	\$301
14	\$137	\$161	\$161	\$158
15			\$323	
16			\$111	
18		\$93	\$124	\$125
19			\$282	\$310
20	\$433	\$357	\$335	\$357
23			\$211	
25	\$111	\$124	\$114	\$111
27		\$270	\$274	\$321
28		\$205	\$208	\$153
30	\$144	\$163	\$137	\$134
32	\$49	\$50	\$47	\$47
34	\$335			
35	\$327	\$336	\$305	\$317
37	\$132	\$144	\$142	
39	\$113	\$58		
40		\$151	\$277	\$155
41	\$117	\$121	\$104	
43	\$117	\$108	\$106	\$105
44	\$204	\$202	\$237	\$240
45	\$196	\$145		
46	\$117	\$100	\$104	\$121
48	\$146	\$203	\$195	\$123
49	\$200	\$205	\$204	\$205
50		\$147	\$197	\$141
51	\$254	\$270	\$308	\$281
52	\$224	\$109		
53	\$122	\$119	\$102	\$109
54		\$75	\$74	
55	\$78	\$79		
57	\$219	\$294	\$361	\$293
58	\$98	\$99		
62		\$313		
63	\$154	\$157	\$209	\$348
66	\$133	\$128		
67	\$120	\$166	\$126	\$148
71	\$105	\$128	\$108	
74			\$242	
76		\$175		
79		\$303	\$309	\$246
91	\$79	\$81	\$77	
97		\$117	\$128	
431		\$93	\$91	

Description of Calculation

Total Payroll personnel costs plus total payroll non-personnel costs, divided by total district payroll spend over \$100,000.

Importance of Measure

This measures the efficiency of the payroll operation. A higher cost could indicate an opportunity to realize efficiencies in payroll operation while a lower cost indicates a leaner, more efficient operation.

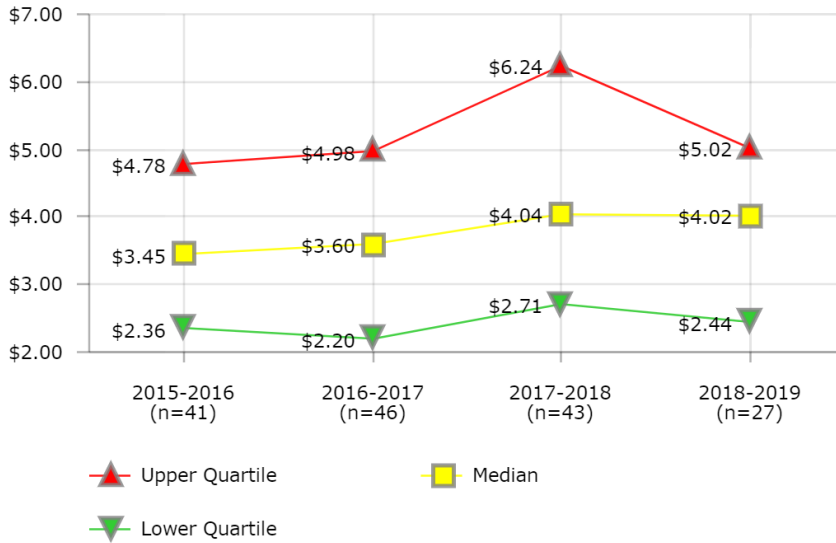
Factors that Influence

- Number of employees processing the payroll
- Skill level of the employees processing payroll
- Types of software/hardware used to process the payroll
- Processes and procedures in place to collect payroll data
- Number of employees being paid
- Number of contracts requiring compliance
- Frequency of payrolls
- Complexity of state/local reporting requirements

Districts in Best Quartile (2018-2019)

- Baltimore City Public Schools
- Jefferson County Public Schools (KY)
- Miami-Dade County Public Schools
- Newark Public Schools
- Orange County Public School District
- Palm Beach County School District
- Pittsburgh Public Schools

COMPENSATION
Payroll Cost per Pay Check



Description of Calculation

Total Payroll personnel costs plus total payroll non-personnel costs, divided by total number of payroll checks.

Importance of Measure

This measures the efficiency of the payroll operation. A higher cost could indicate an opportunity to realize efficiencies in payroll operation while a lower cost indicates a leaner, more efficient operation.

Factors that Influence

- Number of employees processing the payroll
- Skill level of the employees processing payroll
- Types of software/hardware used to process the payroll
- Processes and procedures in place to collect payroll data
- Number of employees being paid
- Number of contracts requiring compliance
- Frequency of payrolls
- Complexity of state/local reporting requirements

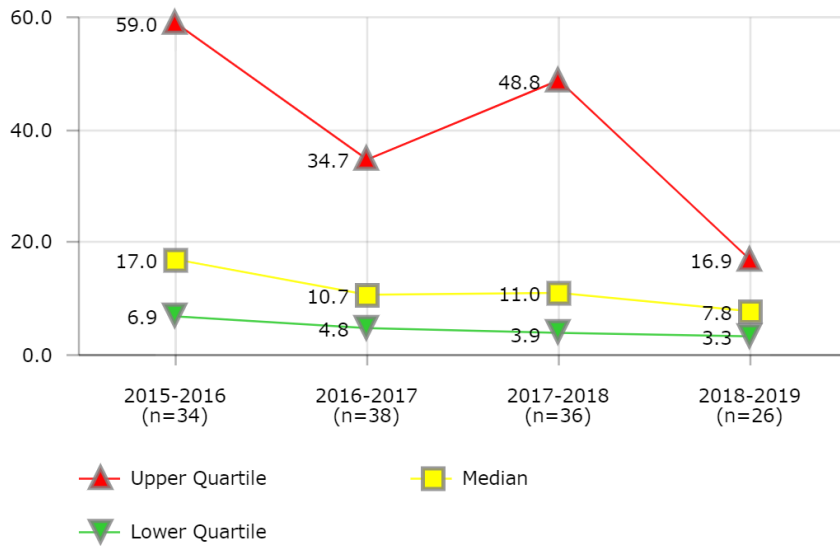
Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Guilford County School District
- Miami-Dade County Public Schools
- Milwaukee Public Schools
- Newark Public Schools
- Orange County Public School District
- Palm Beach County School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1		\$9.01		
2	\$3.70		\$4.98	
3	\$8.85	\$9.25	\$7.94	
4	\$4.65	\$6.35	\$7.27	\$7.04
5		\$6.91	\$6.66	
7	\$4.78	\$4.91	\$5.36	
8	\$2.30	\$2.12	\$2.05	\$1.90
9	\$2.55	\$2.47	\$3.11	\$3.32
10	\$2.14	\$2.20	\$2.48	
11	\$5.54	\$4.60		
12	\$9.68	\$9.73	\$10.09	\$11.29
13	\$1.14	\$1.07	\$0.94	
14	\$2.25	\$2.09	\$3.32	\$2.35
15			\$6.24	
16			\$5.46	
18	\$2.49	\$1.81	\$3.11	\$2.50
20	\$8.57	\$5.96	\$6.63	\$7.51
23			\$3.70	
25	\$2.43	\$2.75	\$2.79	\$2.44
27		\$3.18	\$3.29	\$4.02
28	\$3.06	\$4.65	\$4.72	\$4.67
30	\$2.20	\$2.43	\$2.10	\$2.00
32	\$1.15	\$1.21	\$1.17	\$1.19
34	\$6.09			
35	\$6.67	\$7.31	\$6.43	\$6.91
37	\$4.73	\$4.88	\$5.01	
39	\$2.02	\$1.14		
40		\$5.36	\$7.73	\$4.93
41	\$4.13	\$3.97	\$4.20	
43	\$5.19	\$4.98	\$4.77	\$5.02
44	\$3.41	\$3.58	\$3.04	\$4.29
45	\$3.52	\$3.16		
46	\$3.21	\$2.49	\$2.66	\$3.17
48	\$3.45	\$3.62	\$3.66	\$2.40
49	\$2.36	\$2.61		\$2.42
50		\$4.28	\$5.25	\$3.88
51	\$3.73	\$4.00	\$4.64	\$4.81
52	\$4.77	\$2.33		
53	\$3.04	\$2.91	\$2.90	\$3.13
54	\$1.72	\$1.81	\$1.87	
55	\$1.77	\$1.84	\$1.87	
57	\$6.14	\$5.26	\$6.95	\$4.84
58	\$2.02	\$2.15		
62	\$6.57		\$2.71	
63	\$4.41	\$4.35	\$5.99	\$10.08
66	\$3.63	\$3.66		\$2.98
67	\$5.34	\$7.70	\$6.34	\$8.18
71	\$3.39	\$4.62	\$4.04	
74			\$6.67	
76		\$5.74		
79				\$4.67
91	\$3.10	\$2.84	\$2.78	
97		\$1.54	\$1.70	
431		\$1.98	\$1.95	

COMPENSATION

Pay Checks - Errors per 10K Payments



District	2015-2016	2016-2017	2017-2018	2018-2019
2	17.6			
3	21.9	13.1	5.3	37.0
4	1.8	1.8	6.4	2.0
5		11.4	13.6	
7	4.9	3.3	2.6	
8	2.0	2.5	3.6	3.7
9	1.6	0.3	0.9	0.8
11	28.9	2.7		
12	13.6	10.5	31.6	4.7
13	83.2	79.7	79.6	77.5
14	18.8	10.7	90.1	17.8
15			40.8	
16			91.9	
18	7.1	6.6	10.9	10.6
20		34.7	56.8	82.7
25		17.2	96.8	
27		1.9	1.6	5.2
28		2.7	2.8	1.6
30	9.4	10.6	9.9	9.6
32	1.1	2.1	2.5	1.9
34	73.6			
35	40.1			
37	111.9	277.5	762.2	
39	2.0	6.6		
40		41.5	68.0	13.9
41	35.6	74.9	0.4	
43	16.4	8.7	6.9	5.5
44	6.9	5.9	6.0	6.0
45	1.5			
46	90.6	16.6	17.1	16.9
48	11.2	11.9	11.2	9.7
49	125.6	148.8		
50		10.9	14.0	11.4
51	17.6	10.8	63.3	22.9
52	59.0	329.9	0.9	
53	2.9	2.5	1.7	3.3
54	250.8	244.8		
57			6.3	5.8
58	10.0	4.8		
62	154.7		21.3	
63	47.6	46.5	25.6	15.3
66	11.0	19.0		21.1
67	140.9	5.9	4.3	3.0
71	10.0	26.3	18.7	
76		53.4		
79				1.3
97			66.3	
431		8.1	6.1	

Description of Calculation

Total number of pay check errors, divided by total number of pay checks handled by Payroll department over 10,000.

Importance of Measure

High error rates can indicate a lack of adequate controls.

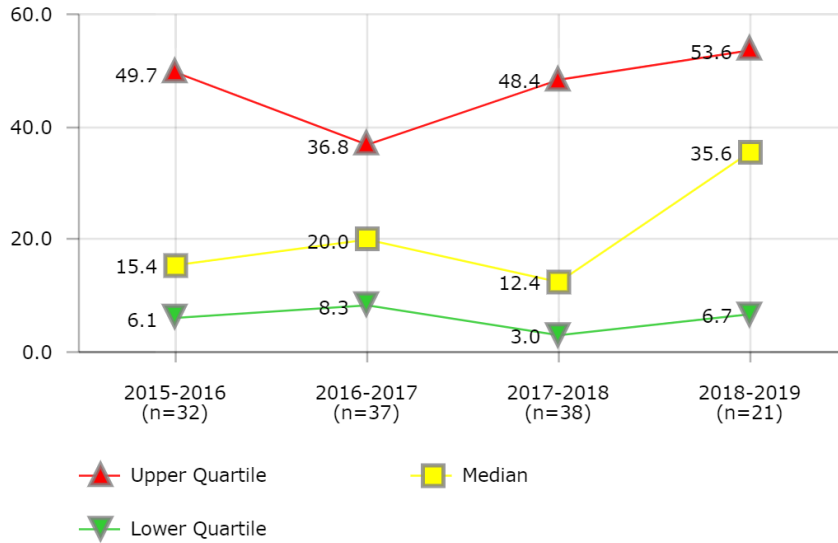
Factors that Influence

- Process controls
- Staff turnover
- Staff experience
- Payment system
- Level of automation

Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Clark County School District
- Fresno Unified School District
- Jefferson County Public Schools (KY)
- Miami-Dade County Public Schools
- Toledo Public Schools
- Wichita Unified School District

COMPENSATION
Payroll Staff - Overtime Hours per FTE



Description of Calculation

Total number of Payroll overtime hours, divided by total number of Payroll staff (FTEs).

Importance of Measure

This measures the efficiency and effectiveness of the payroll department. Excessive overtime can be an indication that staffing levels are inadequate or that processes and procedures need to be revised and streamlined to make the work more efficient. An absence of any overtime may indicate staffing levels that are too high for the volume of work the department is processing.

Factors that Influence

- Staffing levels
- Error rate
- Direct deposit participation

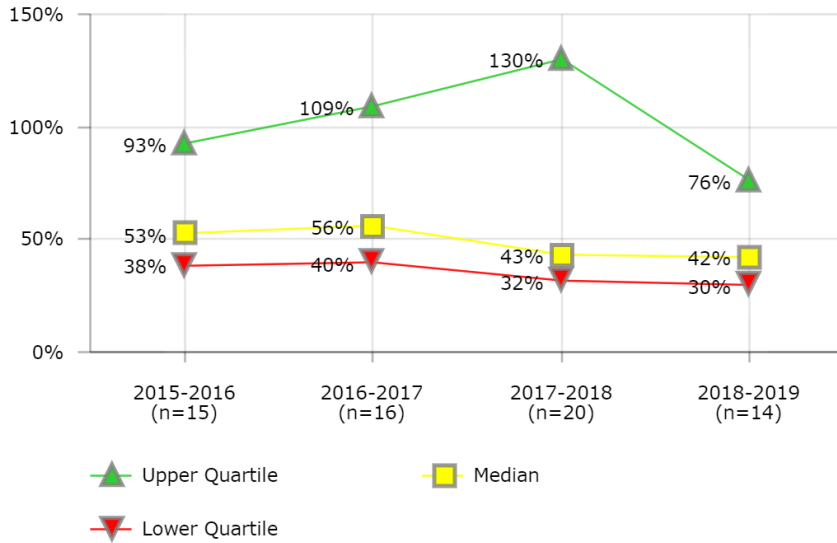
Districts in Best Quartile (2018-2019)

- Clark County School District
- Fresno Unified School District
- Miami-Dade County Public Schools
- Milwaukee Public Schools
- Omaha Public School District
- St. Louis City Public School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1		1.6		
2	38.3		13.6	
3	46.4	36.8	17.2	29.4
4	48.9	50.0	49.5	54.9
5		6.6	0.1	
7	6.4	12.6	12.1	
8			0.1	
9			0.5	0.6
10	31.8	25.3	9.0	
11	24.9	31.7		
12	5.8	4.7		
14	12.8	20.0	38.8	31.1
15			6.4	
16			5.3	
18	10.8	25.1	49.4	25.2
19			11.9	53.6
20	117.3	33.6	85.8	44.0
23			65.4	
25	79.8	102.9	104.2	88.0
27		25.3	23.5	35.6
28	17.5	23.4	40.4	38.3
30	1.7	0.8	3.0	3.3
32	3.2	2.2	2.5	0.9
34	100.0			
35	14.6	8.4		
37	62.5	133.8	37.6	
39	11.1	8.9		
40		88.7	83.0	135.9
43			2.9	
44		12.6	12.8	
45	50.5	53.0		
46	59.4	20.0		67.1
48	15.6	8.3	1.8	
49			0.9	
50		54.5	47.8	43.8
51	5.6	2.4	7.2	31.2
52	3.8	2.0		
53	46.0	54.5	48.4	39.4
54	15.3	23.4	261.7	
55	13.0	10.8	19.1	
57	91.7		334.9	230.8
62	8.1		7.5	
63		1.2	1.1	2.2
66	4.4	13.1		4.3
67	2.3	4.0	5.4	6.7
71	79.2	219.9	115.7	
76		77.7		
91	1.0	10.2	5.3	
431		11.1	2.0	

COMPENSATION

Personnel Record Self-Service Usage per District FTE



District	2015-2016	2016-2017	2017-2018	2018-2019
3		16%	7%	7%
4	57%	43%	51%	50%
5			104%	
8	150%	156%	178%	174%
12	38%	38%		52%
13	93%		43%	
14				30%
23			3%	
25				41%
27				14%
28			39%	76%
30	33%	72%	43%	30%
32	38%	42%	43%	43%
37	53%	57%		
39	52%	98%		
41	48%	36%	27%	
44			43%	34%
46	11%	29%	27%	15%
48	54%	57%		
51		54%	218%	259%
52	228%	55%	37%	
54	142%	121%	134%	
55		120%	158%	
57			172%	
66	2%			
67			76%	104%
91	89%	140%	126%	
97				19%

Description of Calculation

Total number of employee records self-service changes, divided by total number of district employees (FTEs).

Importance of Measure

This measures the level of automation of the payroll department, which can reduce error rates and processing costs.

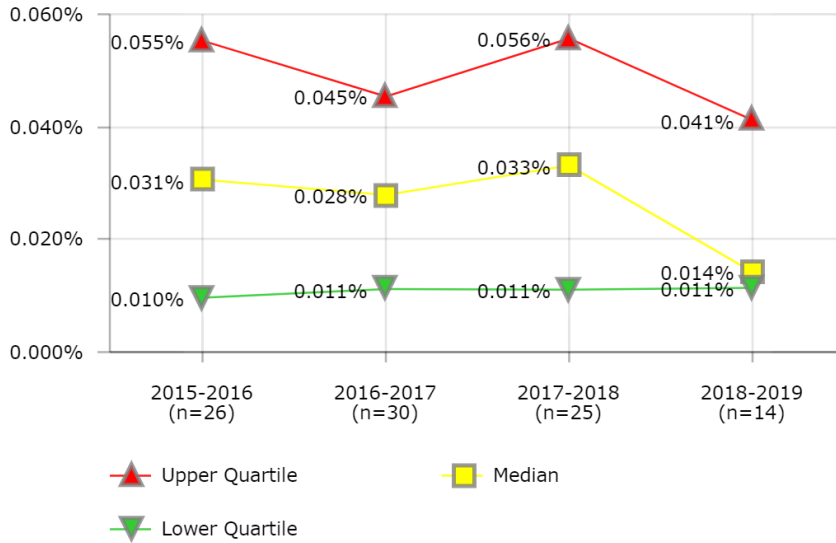
Factors that Influence

- Software used may not provided employee self-service
- Employee self-service modules of the software may not be in use
- Implementation of these modules may be too costly
- Support/help desk services for the employee self-serve modules may not be available

Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Fresno Unified School District
- Oklahoma City Public Schools
- Palm Beach County School District

COMPENSATION
W-2 Correction Rate (W-2c)



Description of Calculation

Total number of W-2(c) forms issued, divided by total number of W-2 forms issued.

Importance of Measure

W-2(c) forms are the result of errors in the initial W-2 filing. Corrections can be costly in terms of staff time.

Factors that Influence

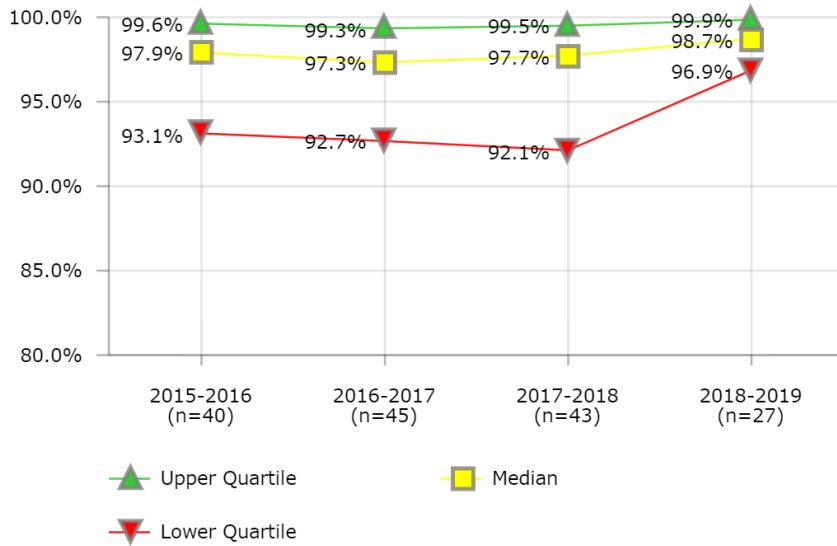
- Process controls
- Quality controls

Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Miami-Dade County Public Schools
- Palm Beach County School District
- St. Paul Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		0.047%		
2	0.967%			
3	0.023%	0.023%	0.035%	0.011%
7	0.035%	0.010%		
8	0.010%	0.010%	0.010%	0.006%
9	0.011%	0.002%	0.007%	0.020%
10	0.006%	0.015%	100.000%	
11	0.044%			
12	0.043%	0.029%		
13	0.013%		0.008%	
14			0.006%	0.013%
18	0.006%	0.012%	0.075%	0.062%
20		0.041%	0.055%	0.041%
25	0.157%	0.079%	0.011%	0.168%
27				0.013%
28		0.011%		0.011%
30	0.029%	0.029%	0.029%	0.015%
32	0.002%	0.002%	0.006%	0.006%
37	0.055%	0.092%	0.056%	
39	0.188%	0.041%		
41	0.008%	0.027%	0.015%	
43	0.060%		0.057%	0.019%
44			0.344%	
46	0.032%	0.024%	0.033%	
48	0.015%	0.044%	0.014%	0.014%
49	0.035%	0.029%		
50			0.041%	
51	0.058%	0.031%		100.000%
53	0.005%	0.005%	0.005%	
54	0.004%	0.016%	0.022%	
55		0.045%	0.041%	
57		0.059%	0.048%	
58	0.042%	0.023%		
63		0.083%		
67	0.016%	0.008%		
71		18.647%	0.058%	
91	0.482%	0.258%	0.066%	
97		0.005%	0.011%	

COMPENSATION
Pay Checks - Direct Deposits



District	2015-2016	2016-2017	2017-2018	2018-2019
1		90.5%		
2	99.8%		91.3%	
3	94.0%	96.3%	97.0%	
4	94.4%	94.4%	97.5%	95.6%
5		87.2%	83.0%	
7	89.1%	89.7%	90.5%	
8	97.8%	98.1%	98.0%	97.9%
9	89.8%	90.8%	90.5%	91.1%
10	98.5%	98.3%	98.4%	
11	83.2%	85.5%		
12	96.8%	97.2%	97.7%	98.7%
13	98.9%	98.9%	99.0%	99.2%
14	99.1%	99.3%	99.1%	99.2%
15			89.2%	
16			89.5%	
18	99.4%	99.9%	99.9%	99.8%
20	94.9%	97.0%	97.0%	99.5%
23			97.3%	
25	86.7%	97.3%	96.0%	
27		97.8%	98.2%	98.3%
28	100.0%	100.0%	100.0%	100.0%
30	84.8%	86.3%	86.6%	95.6%
32	99.8%	99.8%	99.8%	99.9%
34	100.0%			
35	97.4%	98.5%	96.8%	98.6%
37	100.0%	100.0%	100.0%	
39	95.9%	99.5%		
40			99.8%	99.9%
41	99.5%	91.5%	99.2%	
43	100.0%	100.0%	100.0%	100.0%
44	98.0%	97.5%	97.9%	98.4%
45	84.1%	85.2%		
46	92.1%	92.7%	92.1%	92.5%
48	99.6%	99.5%	99.5%	99.6%
49	95.8%	96.4%		97.0%
50		97.1%	96.6%	98.7%
51	100.0%	99.5%	99.4%	100.0%
52	94.7%	96.6%	97.0%	
53	100.0%	100.0%	100.0%	100.0%
54	99.1%	96.7%	96.8%	
55		100.6%		
57	99.7%	94.7%	100.0%	100.0%
58	95.4%	95.0%		
62	84.7%		90.6%	
63	98.5%	99.0%	99.4%	99.5%
66	99.1%	98.3%		96.9%
67	85.1%	87.4%	87.6%	90.5%
71	99.9%	99.8%	99.8%	
74			86.6%	
76		68.4%		
79				0.0%
91	92.2%	92.6%	92.7%	
97		98.9%	104.9%	
431		99.3%	99.2%	

Description of Calculation

Total number of pay checks paid through direct deposit, divided by the total number of pay checks issued.

Importance of Measure

Use of direct deposit can increase the levels of automation and decrease costs.

Factors that Influence

- Payment systems
- Pay check policy

Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Cleveland Metropolitan School District
- Fort Worth Independent School District
- Jefferson County Public Schools (KY)
- Miami-Dade County Public Schools
- Oklahoma City Public Schools
- Pittsburgh Public Schools

Financial Management

Performance metrics in financial management assess the overall financial health of a district, as measured by its **Fund Balance Ratio to District Revenue** and **Debt Service Burden per \$1,000 Revenue**. They also measure a district's *practices in effective budgeting*. These practices are broadly represented by a district's **Expenditure Efficiency** and **Revenue Efficiency**, which compare the adopted and final budgets to actual levels of income and spending. A value close to 100% shows highly accurate budget forecasting. Finally, **Days to Publish Annual Financial Report** is a measure of the timeliness of a district's financial disclosures.

Generally, *leadership and governance factors* are the starting point of good financial health:

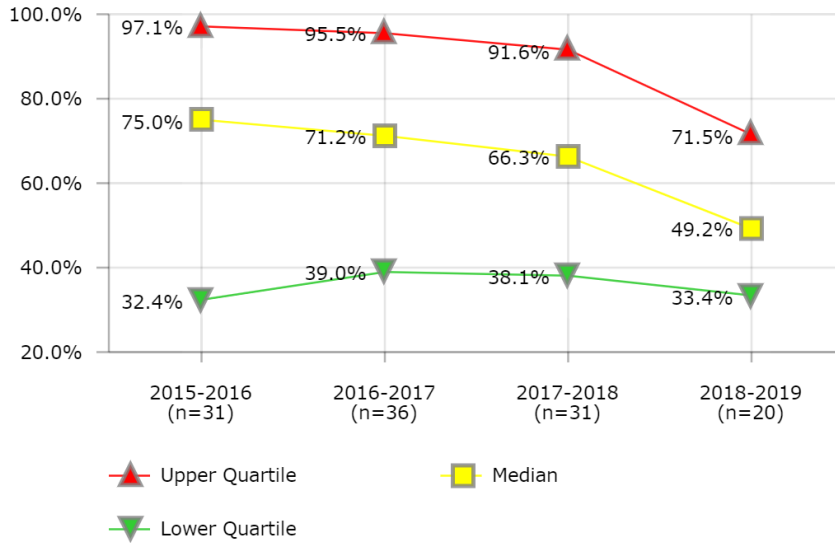
- School board and administrative policies and procedures
- Budget development and management processes
- Unrestricted fund balance use policies and procedures
- Operating funds definition

Additionally, other conditions and factors should be considered as you evaluate your district's financial health and forecast for the future:

- Revenue experience, variability, and forecasts
- Expenditure trends, volatility, and projections
- Per capita income levels
- Real property values
- Local retail sales and business receipts
- Commercial acreage and business property market value
- Changes in local employment base
- Changes in residential development trends
- Restrictions on legal reserves
- Age of district infrastructure
- Monitoring and reporting systems

FINANCIAL MANAGEMENT

Debt Principal Ratio to District Revenue



Description of Calculation

Total debt principal, divided by total debt servicing costs.

Importance of Measure

This evaluates the total level of debt that the district currently owes relative to its annual revenue.

Factors that Influence

- Tax base and growth projections
- Capital projects
- Levels of state and grant funding
- Interest rates (cost of borrowing)
- Fund balance ratio

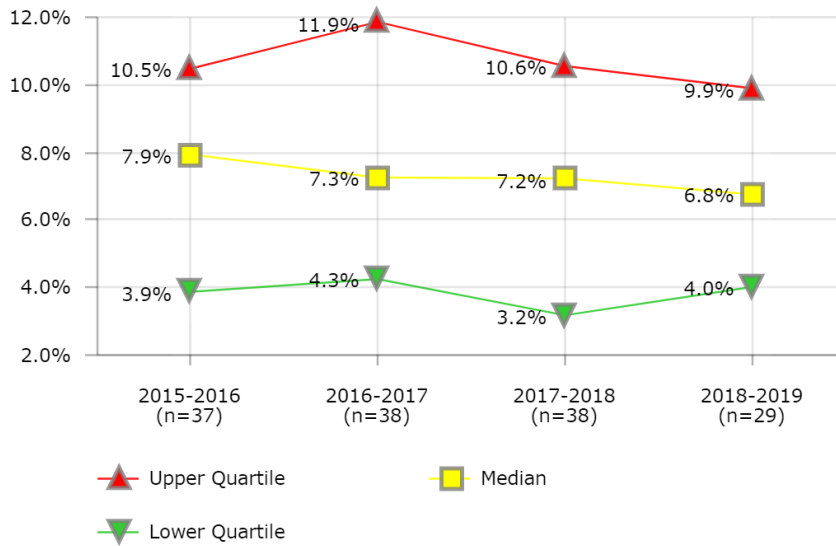
Districts in Best Quartile (2018-2019)

- Cleveland Metropolitan School District
- Des Moines Public Schools
- Jefferson County Public Schools (KY)
- Seattle School District 1
- Toledo Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1				2.4%
3	27.6%	58.5%		65.0%
4	75.0%	70.5%	59.8%	60.5%
7	85.3%	79.7%	76.2%	
8	97.1%	88.4%	78.1%	72.3%
9	100.8%	90.9%	91.6%	91.4%
10	51.3%	52.0%	48.1%	
11	140.9%	131.8%		
12	32.4%	29.1%	35.9%	32.6%
13	80.4%		72.2%	74.3%
14	73.0%	81.6%	89.1%	78.7%
18		0.0%		
20	72.1%	67.1%	61.5%	59.2%
23			103.1%	
28	11.2%	10.2%	9.6%	
30	32.4%	34.1%	35.6%	34.2%
32	116.1%	125.3%	116.2%	111.0%
34	25.8%			
35	47.0%	49.2%	45.6%	39.7%
37	234.8%	263.2%		
39	146.7%	161.6%		
40		104.7%	127.3%	
41		174.9%	164.8%	
43	25.4%	46.8%	42.5%	41.0%
44	41.0%	38.9%	38.1%	35.7%
45		91.2%		
47	83.2%	96.9%	82.6%	
48	76.4%	72.0%	66.3%	
51	55.7%	40.8%	51.6%	40.7%
53		39.0%	32.8%	32.0%
54	134.9%		149.3%	
55	0.1%	0.0%		
57		34.3%	26.8%	25.8%
58	98.0%	103.7%	90.0%	
62	10.2%			
63	86.7%	77.5%	78.3%	70.8%
67	51.9%	63.9%	58.5%	57.5%
71	79.3%	94.1%		
79		27.9%	25.1%	25.0%
91	82.8%	90.4%	123.7%	
97		1.5%	7.7%	
431		107.0%	110.2%	

FINANCIAL MANAGEMENT

Debt Servicing Costs Ratio to District Revenue



District	2015-2016	2016-2017	2017-2018	2018-2019
1				0.3%
3	5.7%	5.7%		6.1%
4	15.4%	7.8%	7.1%	8.9%
7	12.4%	12.2%	12.0%	
8	8.2%	9.3%	11.5%	8.5%
9	15.9%	15.7%	15.5%	14.4%
10	17.0%	7.4%	10.2%	
11	12.6%	12.2%		12.1%
12	3.4%	4.3%	3.2%	4.0%
13	8.0%		7.3%	7.8%
14	10.5%	9.6%	10.7%	9.9%
16	7.3%			14.8%
18		0.0%		
20	7.0%	6.9%	7.0%	6.8%
23			10.2%	
28	1.8%	1.7%	0.8%	
30	2.7%	6.9%	3.0%	3.3%
32	9.6%	9.3%	10.6%	9.3%
34	2.7%			
35	2.2%	2.2%	2.3%	4.6%
37	16.1%	18.5%		
39	13.9%	16.6%		
40		11.9%	12.9%	
41	0.3%	15.5%	14.3%	
43	4.1%	7.0%	7.2%	6.4%
44	2.8%	2.3%	2.3%	2.7%
45		27.4%		
47	9.3%	5.7%	9.9%	
48	5.6%	5.3%	5.1%	4.7%
51	8.5%	8.7%	10.2%	12.8%
53		3.9%	3.7%	3.7%
54	9.9%	11191.1%	10.8%	
55	0.0%	0.0%	0.0%	
56	6.5%		7.2%	10.3%
57		2.6%	2.1%	1.8%
58	8.3%	43.7%	7.9%	
61	12.1%		14.0%	13.6%
62	0.0%			9.8%
63	7.9%	7.9%	8.0%	8.5%
67	4.2%	4.3%	4.4%	4.5%
71	7.7%	9.0%	0.0%	
77	11.2%		14.4%	11.9%
79		2.5%	2.3%	2.5%
91	9.5%	9.2%	10.1%	
97		0.6%	0.6%	
101	3.9%		4.3%	4.0%
431		6.6%	7.6%	
1728		7.1%	6.3%	6.2%

Description of Calculation

Total debt servicing costs, divided by total district operating revenue.

Importance of Measure

This evaluates the annual amount paid in debt servicing relative to annual district revenue.

Factors that Influence

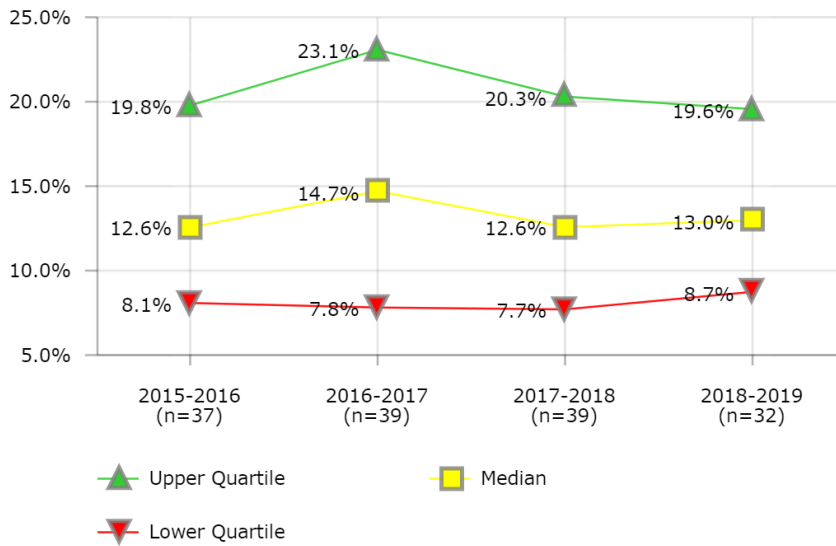
- Interest rates (cost of borrowing)
- Level of debt
- Tax base and growth projections
- Revenue sources to pay down debt
- Fund balance ratio

Districts in Best Quartile (2018-2019)

- Cleveland Metropolitan School District
- Des Moines Public Schools
- Duval County Public Schools
- Jefferson County Public Schools (KY)
- Milwaukee Public Schools
- Santa Ana Unified School District
- Seattle School District 1
- Toledo Public Schools

FINANCIAL MANAGEMENT

Fund Balance Ratio (E) All Types



Description of Calculation

Total fund balance of all types (includes unassigned, assigned, committed, restricted and nonspendable fund balance), divided by total district operating expenditures.

Importance of Measure

This measure assesses the fiscal health of the district supported by the general fund, including financial capacity to meet unexpected or planned future needs. A high percentage indicates greater fiscal health and financial capacity to meet unexpected or future needs. A low percentage indicates risk for the district in its ability to meet unexpected changes in revenues or expenses.

Factors that Influence

- School board and administrative policies and procedures
- Administrative leadership and decision making processes
- Budget development and management processes
- Revenue experience, variability and forecasts
- Expenditure trends, volatility and projections
- Planned uses of fund balance
- Restrictions on legal reserves
- Unreserved fund balance use policies and procedures
- Local fiscal authority policies and procedures
- Operating funds definition

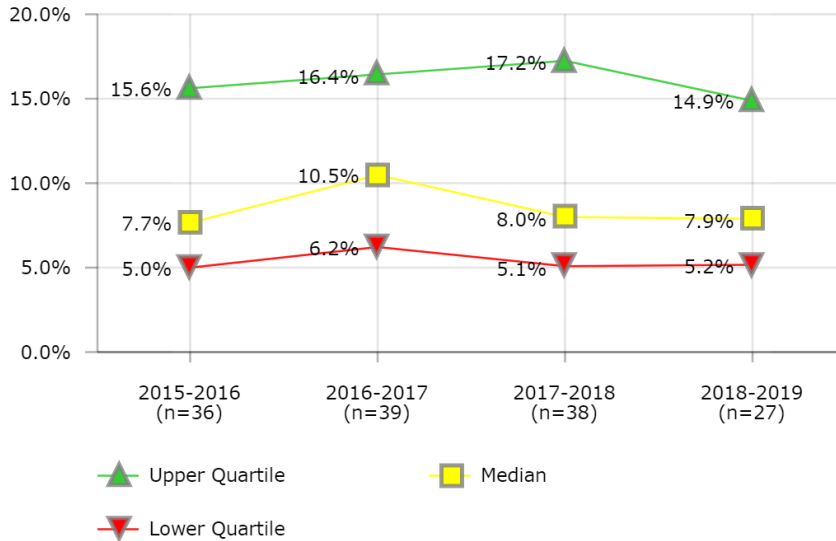
Districts in Best Quartile (2018-2019)

- Cincinnati Public Schools
- Columbus Public Schools
- Long Beach Unified School District
- Los Angeles Unified School District
- Santa Ana Unified School District
- St. Louis City Public School District
- Stockton Unified School District
- Toledo Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1				17.1%
2	7.6%			
3	8.7%	9.8%		15.4%
4	9.4%	9.8%	8.3%	9.6%
7	19.8%	17.8%	18.1%	
8	7.5%	7.8%	8.6%	9.8%
9	3.5%	2.2%		7.5%
10	8.7%	7.5%	7.7%	
11	19.0%	24.9%		23.1%
12	15.1%	14.7%	14.8%	17.0%
13	8.1%		6.7%	6.4%
14	9.2%	8.5%	10.0%	9.6%
16	12.6%			7.9%
18		18.2%	17.9%	13.8%
19			28.6%	
20	32.8%	34.5%	34.1%	27.1%
23			12.6%	
25			8.1%	10.1%
27				7.7%
28	13.6%	12.3%	10.4%	
30	7.6%	3.8%	3.4%	3.6%
32	5.8%	7.1%	7.7%	7.3%
34	26.2%			
35	34.5%	34.9%	41.1%	45.7%
37	14.0%	14.8%		
39	39.4%	36.8%		
40		55.0%		
41	23.6%	16.3%	23.6%	
43	24.2%	23.1%	19.5%	16.2%
44	9.5%	7.2%	5.5%	7.6%
45		18.6%		
47	8.6%	7.4%	7.2%	
48	26.1%	24.0%	21.8%	
49	2.5%	6.8%		
50		13.4%	20.3%	18.2%
51	17.8%	10.2%	19.9%	15.7%
53		22.9%	17.0%	10.5%
54			6.1%	
55	7.0%	6.4%	5.1%	
56	20.2%			29.7%
57		12.5%	6.5%	2.4%
58	3.5%	0.7%	2.2%	
61	6.6%		9.4%	12.2%
62	16.0%			11.1%
63	19.3%	25.1%	37.5%	40.0%
67	10.7%	17.5%	14.8%	14.6%
71	30.5%	24.8%	19.1%	
77	15.3%		10.6%	10.6%
79		20.4%	21.5%	24.7%
91	11.1%	8.4%	7.9%	
97		8.0%	7.9%	
101			14.7%	20.9%
431		23.0%	21.8%	
1728		33.4%	27.8%	22.5%

FINANCIAL MANAGEMENT

Fund Balance Ratio (C) Unrestricted



District	2015-2016	2016-2017	2017-2018	2018-2019
1				16.0%
2	5.9%			
3	4.8%	9.2%		8.4%
4	6.5%	6.9%	5.1%	6.2%
7	15.6%	13.7%	13.8%	
8	6.1%	6.2%	6.8%	7.9%
9	2.7%	0.8%	1.3%	3.5%
10	7.0%	5.4%	5.8%	
11	15.6%	22.1%		1.8%
12	11.1%	10.6%	11.4%	13.5%
13	6.5%		5.5%	5.2%
14	7.6%	6.5%	7.6%	7.2%
18		14.3%	14.0%	9.8%
19			26.7%	
20	22.5%	25.5%	24.6%	22.7%
23			11.3%	
25			3.9%	5.6%
27				4.3%
28	11.8%	10.5%	8.4%	
30	3.9%	2.8%	2.6%	2.8%
32	5.2%	6.5%	7.1%	6.6%
34	26.1%			
35	27.8%	29.2%	35.1%	39.8%
37	7.1%	9.3%		
39	37.1%	34.4%		
40		23.6%		
41	22.9%	15.5%	22.7%	
43	23.3%	21.8%	18.0%	14.7%
44	7.7%	5.4%	3.8%	5.4%
45		16.0%		
46	0.0%	0.0%	0.0%	0.0%
47	8.4%	7.2%		
48	24.0%	22.3%	20.5%	
49	1.1%	3.0%		
50		13.0%	16.8%	14.9%
51	14.3%	9.9%	16.7%	15.4%
53		12.4%	10.9%	8.9%
54			4.9%	
55	2.4%	1.5%	2.0%	
56			5.9%	6.5%
57		9.7%	4.5%	0.4%
58	3.3%	0.5%	2.0%	
61	0.3%			
62	14.3%			
63	6.1%	14.0%	20.1%	25.9%
67	9.5%	16.4%	12.9%	13.0%
71	17.5%	24.5%	19.1%	
79		13.3%	21.5%	23.1%
91	10.5%	7.9%	7.4%	
97		5.0%	5.7%	
101	1.2%		5.9%	
431		21.8%	17.2%	

Description of Calculation

Total fund balance that was unrestricted (includes unassigned, assigned and committed fund balance), divided by total district operating expenditures.

Importance of Measure

This measure assesses the fiscal health of the district supported by the general fund, including financial capacity to meet unexpected or planned future needs. A high percentage indicates greater fiscal health and financial capacity to meet unexpected or future needs. A low percentage indicates risk for the district in its ability to meet unexpected changes in revenues or expenses.

Factors that Influence

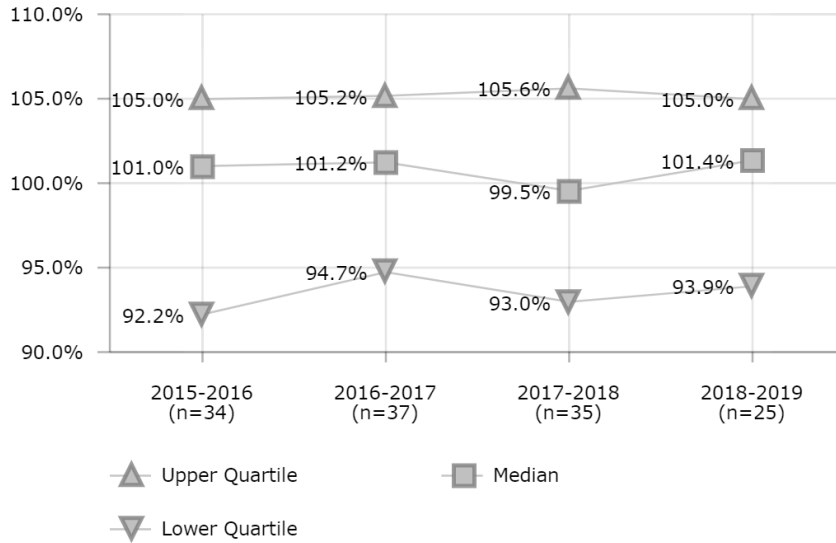
- School board and administrative policies and procedures
- Administrative leadership and decision making processes
- Budget development and management processes
- Revenue experience, variability and forecasts
- Expenditure trends, volatility and projections
- Planned uses of fund balance
- Restrictions on legal reserves
- Unreserved fund balance use policies and procedures
- Local fiscal authority policies and procedures
- Operating funds definition

Districts in Best Quartile (2018-2019)

- Cincinnati Public Schools
- Columbus Public Schools
- Detroit Public Schools
- Oklahoma City Public Schools
- Seattle School District 1
- St. Louis City Public School District
- Toledo Public Schools

FINANCIAL MANAGEMENT

Expenditures Efficiency - Adopted Budget as Percent of Actual



Description of Calculation

Total budgeted expenditures in the adopted budget, divided by total district operating expenditures.

Importance of Measure

This measure assesses efficiency in spending against the initially adopted general fund expenditure budget. A high percentage nearing 100% indicates efficient utilization of appropriated resources. A low percentage, or a percentage significantly exceeding 100%, indicates major variance from the final approved budget and signifies that the budget was inaccurate, misaligned with the actual needs of the school system, significantly impacted by unforeseen factors, and/ or potentially mismanaged. Districts experiencing a low percentage or a significantly high percentage should thoroughly investigate the causes for the variances and reevaluate their budget development and management processes to improve accuracy and alignment. Districts having significant variances in expenditures to budget when measured against the original budget, but near 100% when measured against the final amended budget, are monitoring and adjusting their budgets during the year to meet the changing conditions of the district. Such districts should also consider reevaluating their budget development and management processes to improve accuracy and alignment.

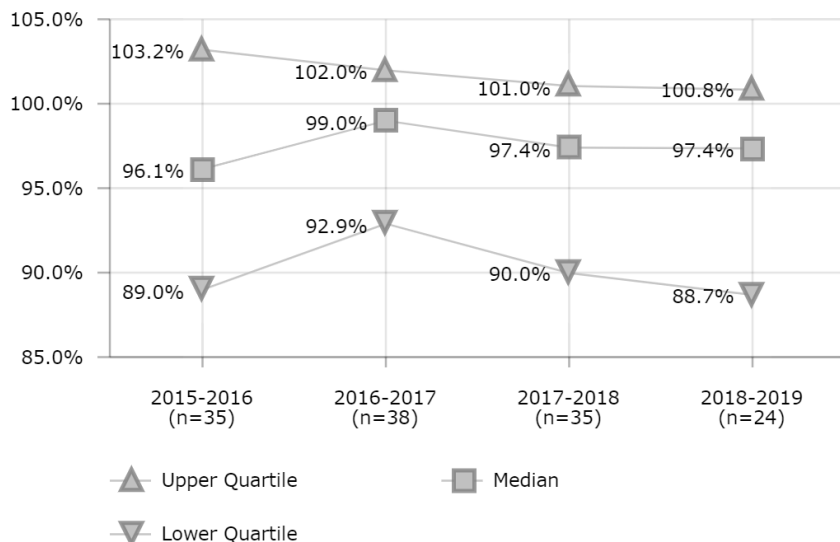
Factors that Influence

- School board and administrative policies and procedures
- Budget development and management processes
- Administrative organizational structure, leadership styles, decision making processes and distribution of authority
- Departmental and individual employee responsibilities and competencies
- Performance management, monitoring, and reporting systems
- General Fund definition

District	2015-2016	2016-2017	2017-2018	2018-2019
1				105.5%
2	85.5%			
3	55.2%	92.9%		92.4%
4	97.1%	97.7%	91.1%	109.3%
7	93.7%	94.7%	96.2%	
8	104.2%	102.6%	104.9%	105.1%
9	101.2%	100.5%	103.0%	101.4%
10	116.0%	99.1%	99.5%	
11	101.8%	104.1%		
12		79.2%	80.7%	82.2%
13	101.7%		98.7%	98.7%
14	107.2%	109.3%	107.2%	105.2%
18		106.0%	102.3%	102.5%
19			113.1%	
20	99.0%	99.3%	102.9%	78.5%
23			95.4%	
25	91.7%		93.0%	93.9%
27				102.4%
28	106.0%	101.4%	102.3%	
30	98.4%	97.0%	96.8%	96.6%
32	105.0%	106.7%	105.6%	105.0%
34	92.2%			
35	107.1%	105.2%	108.2%	107.8%
37	109.9%	101.7%		
39	104.4%	101.2%		
40		92.2%		
41	84.1%	94.4%	96.2%	
43	86.8%	87.2%	87.5%	88.6%
44	108.5%	105.9%	105.9%	106.9%
45		98.2%		
47	103.7%	103.7%	106.0%	
48	96.9%	95.2%	93.6%	94.9%
49	89.0%			
50		111.3%	85.8%	80.4%
51	104.2%	87.1%	107.8%	103.1%
53		112.7%	97.3%	103.4%
54	100.8%		103.1%	
55	105.1%	102.3%	100.5%	
57		105.2%	79.5%	79.5%
58	89.6%	89.1%		
62	97.0%			
63	100.6%	102.7%	102.0%	98.9%
67	89.2%	100.1%	91.8%	94.5%
71	114.1%	94.0%	92.4%	
79		85.8%	81.1%	101.5%
91	104.1%	105.9%	106.2%	
97		101.9%	97.0%	
431		124.0%	111.8%	

FINANCIAL MANAGEMENT

Revenues Efficiency - Adopted Budget as Percent of Actual



District	2015-2016	2016-2017	2017-2018	2018-2019
1				100.2%
2	83.1%			
3	55.0%	88.2%		92.2%
4	95.4%	94.7%	90.5%	106.0%
7	95.8%	95.1%	96.0%	
8	98.5%	97.2%	97.8%	97.5%
9	103.2%	101.3%	100.7%	97.2%
10	100.9%	101.7%	100.2%	
11	95.7%	97.8%		
12	75.3%	80.0%	79.8%	81.1%
13		101.3%	100.3%	98.5%
14		98.6%	98.6%	97.6%
18		103.4%	100.5%	101.3%
20	94.8%	93.9%	108.5%	77.3%
23			94.0%	
25	90.7%		89.6%	
27				100.5%
28	103.5%	100.9%	100.5%	
30	95.7%	96.8%	97.2%	96.6%
32	102.9%	103.3%	101.2%	101.1%
34	91.8%			
35	117.1%	110.4%	113.6%	114.9%
37	96.1%	91.0%		
39	98.6%	99.7%		
40		88.5%	97.4%	
41	87.2%	92.8%	90.8%	
43	44.4%	88.7%	86.7%	86.7%
44	104.0%	103.3%	103.9%	102.0%
45		100.8%		
47	103.4%	99.7%	103.7%	
48	90.7%	92.0%	90.0%	90.9%
49	89.0%	144.9%		
50		100.7%	80.8%	81.7%
51	103.3%	94.5%	114.0%	107.8%
53		110.5%	94.8%	98.2%
54	111.9%		93.4%	
55	104.2%	102.0%	101.0%	
57		101.2%	81.8%	85.0%
58	87.0%	99.4%		
62	54.5%			
63	101.7%	95.9%	97.8%	94.8%
67	88.7%	92.9%	89.1%	90.6%
71	118.7%	92.4%	89.7%	
79		82.0%	77.7%	12.1%
91	101.1%	103.0%	103.1%	
97		105.2%	96.3%	
431		125.7%	113.6%	

Description of Calculation

Total budgeted revenue in the adopted budget, divided by total district operating revenue.

Importance of Measure

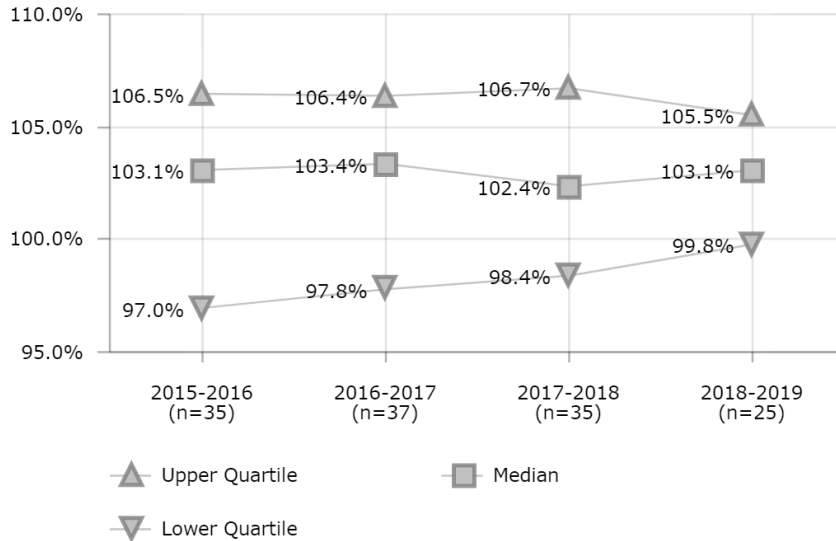
This measure assesses efficiency in spending against the initially adopted general fund revenue budget. A high percentage nearing 100% indicates efficient utilization of appropriated resources. A low percentage, or a percentage significantly exceeding 100%, indicates major variance from the final approved budget and signifies that the budget was inaccurate, misaligned with the actual needs of the school system, significantly impacted by unforeseen factors, and/or potentially mismanaged. Districts experiencing a low percentage or a significantly high percentage should thoroughly investigate the causes for the variances and reevaluate their budget development and management processes to improve accuracy and alignment. Districts having significant variances in expenditures to budget when measured against the original budget, but near 100% when measured against the final amended budget, are monitoring and adjusting their budgets during the year to meet the changing conditions of the district. Such districts should also consider reevaluating their budget development and management processes to improve accuracy and alignment.

Factors that Influence

- School board and administrative policies and procedures
- Budget development and management processes
- Administrative organizational structure, leadership styles, decision making processes and distribution of authority
- Departmental and individual employee responsibilities and competencies
- Performance management, monitoring, and reporting systems
- General Fund definition

FINANCIAL MANAGEMENT

Expenditures Efficiency - Final Budget as Percent of Actual



Description of Calculation

Total budgeted expenditures in the final budget, divided by total district operating expenditures.

Importance of Measure

This measure assesses efficiency in spending against the final approved general fund expenditure budget. A high percentage nearing 100% indicates efficient utilization of appropriated resources. A low percentage, or a percentage significantly exceeding 100%, indicates major variance from the final approved budget and signifies that the budget was inaccurate, misaligned with the actual needs of the school system, significantly impacted by unforeseen factors, and/or potentially mismanaged. Districts experiencing a low percentage or a significantly high percentage should thoroughly investigate the causes for the variances and reevaluate their budget development and management processes to improve accuracy and alignment. Districts having significant variances in expenditures to budget when measured against the original budget, but near 100% when measured against the final amended budget, are monitoring and adjusting their budgets during the year to meet the changing conditions of the district. Such districts should also consider reevaluating their budget development and management processes to improve accuracy and alignment.

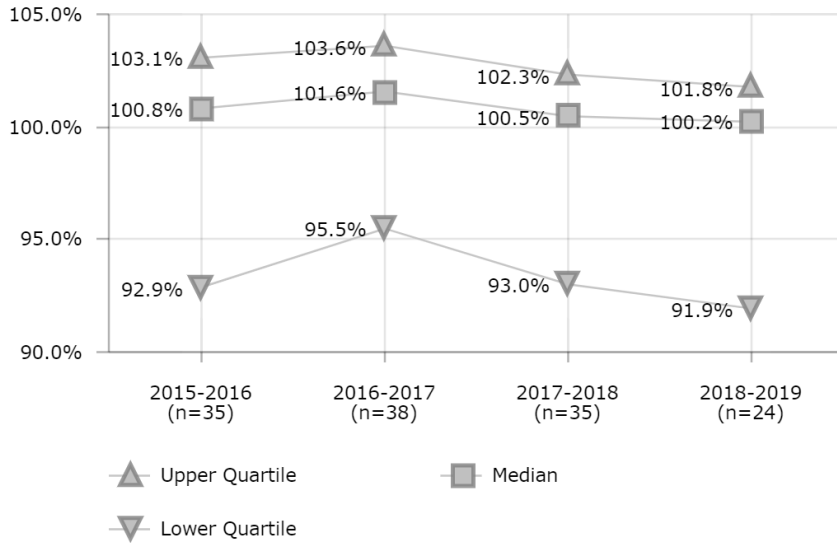
Factors that Influence

- School board and administrative policies and procedures
- Budget development and management processes
- Administrative organizational structure, leadership styles, decision making processes and distribution of authority
- Departmental and individual employee responsibilities and competencies
- Performance management, monitoring, and reporting systems
- General Fund definition

District	2015-2016	2016-2017	2017-2018	2018-2019
1				105.5%
2	86.4%			
3	58.2%	97.4%		100.3%
4	97.0%	97.8%	91.1%	109.3%
7	95.8%	95.1%	99.1%	
8	105.5%	106.4%	107.3%	107.8%
9	103.4%	101.7%	102.1%	106.0%
10	118.3%	104.2%	104.2%	
11	106.6%	107.1%		
12	77.6%	80.5%	82.4%	82.9%
13	102.5%		101.5%	100.8%
14	112.1%	110.0%	111.3%	110.7%
18		106.4%	106.7%	105.1%
19			109.1%	
20	99.3%	104.2%	106.8%	81.6%
23			100.5%	
25	97.6%		100.0%	101.6%
27				102.4%
28	102.1%	105.6%	104.1%	
30	105.7%	102.5%	101.7%	103.9%
32	103.1%	103.4%	103.2%	104.0%
34	101.3%			
35	106.5%	105.5%	107.3%	101.5%
37	112.0%	106.5%		
39	119.6%	116.5%		
40		92.6%		
41	89.2%	101.0%	102.0%	
43	86.8%	87.2%	87.5%	88.6%
44	107.8%	105.9%	106.5%	108.9%
45		103.4%		
47	103.7%	103.7%	106.0%	
48	107.9%	105.6%	102.7%	104.4%
49	92.4%			
50		110.6%	77.3%	83.3%
51	104.2%	87.1%	107.8%	103.1%
53		113.0%	97.2%	104.9%
54	99.9%		103.1%	
55	105.5%	103.3%	101.9%	
57		102.4%	80.1%	79.6%
58	90.3%	84.6%		
62	101.6%			
63	104.3%	108.6%	104.7%	99.8%
67	97.7%	101.5%	98.4%	96.2%
71	104.3%	95.6%	94.4%	
79		89.4%	83.6%	106.2%
91	108.0%	105.6%	107.0%	
97		102.8%	102.4%	
431		119.3%	108.8%	

FINANCIAL MANAGEMENT

Revenues Efficiency - Final Budget as Percent of Actual



District	2015-2016	2016-2017	2017-2018	2018-2019
1				100.2%
2	83.9%			
3	56.9%	95.5%		98.8%
4	95.2%	94.8%	90.5%	106.0%
7	96.5%	96.0%	98.5%	
8	101.0%	101.4%	101.6%	101.1%
9	104.2%	101.7%	100.5%	101.6%
10	102.5%	102.0%	101.8%	
11	98.1%	99.4%		
12	76.6%	81.0%	80.4%	81.7%
13	101.6%		101.0%	100.2%
14	102.2%	98.8%	101.8%	101.8%
18		103.3%	102.0%	101.7%
20	100.0%	105.6%	115.7%	81.4%
23			98.9%	
25	94.4%		100.0%	
27				100.5%
28	99.5%	102.4%	102.3%	
30	98.5%	97.7%	98.1%	100.4%
32	102.4%	102.4%	102.0%	102.0%
34	100.8%			
35	116.5%	112.0%	114.7%	122.8%
37	96.7%	96.6%		
39	100.8%	104.8%		
40		88.9%	99.3%	
41	89.0%	95.4%	94.0%	
43	44.4%	88.7%	86.7%	86.7%
44	103.1%	102.7%	103.4%	104.3%
45		106.1%		
47	103.4%	99.7%	103.7%	
48	101.1%	102.4%	98.8%	100.2%
49	92.4%	151.4%		
50		108.8%	81.4%	83.1%
51	103.3%	94.5%	114.0%	107.8%
53		110.8%	94.8%	90.3%
54	110.9%		92.5%	
55	103.9%	103.0%	102.4%	
57		100.3%	81.1%	86.8%
58	89.1%	97.7%		
62	59.2%			
63	105.5%	103.6%	101.3%	94.8%
67	92.9%	94.9%	92.5%	93.5%
71	105.1%	93.1%	93.0%	
79		85.4%	79.4%	99.6%
91	102.4%	102.7%	102.6%	
97		106.0%	101.3%	
431		117.2%	103.8%	

Description of Calculation

Total budgeted revenue in the final budget, divided by total district operating revenue.

Importance of Measure

This measure assesses efficiency in spending against the final approved general fund revenue budget. A high percentage nearing 100% indicates efficient utilization of appropriated resources. A low percentage, or a percentage significantly exceeding 100%, indicates major variance from the final approved budget and signifies that the budget was inaccurate, misaligned with the actual needs of the school system, significantly impacted by unforeseen factors, and/or potentially mismanaged. Districts experiencing a low percentage or a significantly high percentage should thoroughly investigate the causes for the variances and reevaluate their budget development and management processes to improve accuracy and alignment. Districts having significant variances in expenditures to budget when measured against the original budget, but near 100% when measured against the final amended budget, are monitoring and adjusting their budgets during the year to meet the changing conditions of the district. Such districts should also consider reevaluating their budget development and management processes to improve accuracy and alignment.

Factors that Influence

- School board and administrative policies and procedures
- Budget development and management processes
- Administrative organizational structure, leadership styles, decision making processes and distribution of authority
- Departmental and individual employee responsibilities and competencies
- Performance management, monitoring, and reporting systems
- General Fund definition

Grants Management

Good performance in grants management is reflected in a few basic performance characteristics. Cash flow and availability of grant funds are the primary concerns: Do you spend all your grant funds in the grant period? How quickly do you process reimbursements? These are addressed in part using the metrics **Returned Grant Funds per \$100K**, **Grant Revenue** and **Aging of Grants Receivables**.

Grant-funded programming should also be considered an exposure to risk. Looking at levels of **Grant-Funded FTE Dependence** can guide a district to either:

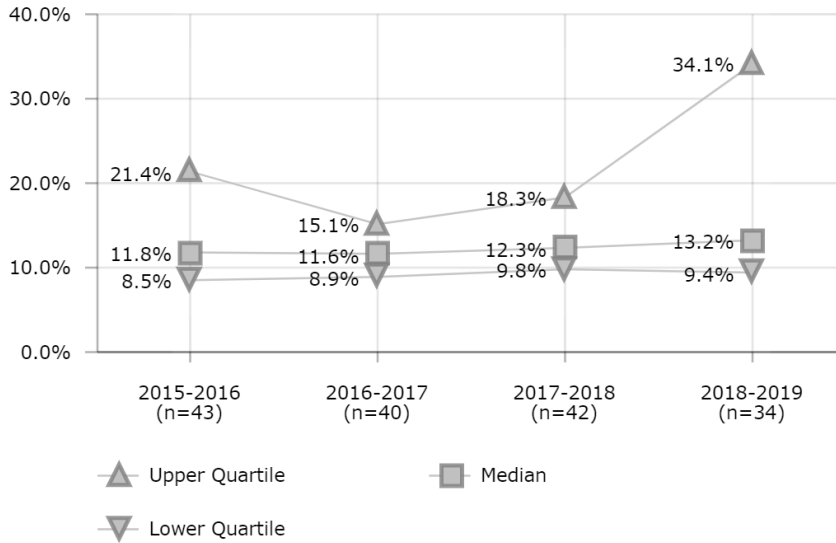
1. Allocate enough fund reserves to insure themselves against possible shifts in funding sources; or
2. Have an evaluation system in place that helps determine whether positions should be continued beyond the term of a grant.

These metrics should give a basic sense of where a district might improve its performance in grants management. Areas of improvement may include:

- Monitoring and reporting systems
- Escalation procedures to address timeliness
- Administrative leadership style, decision-making process, and distribution of organizational authority
- SchoolBoard, administrative policies, and management process
- Procurement regulations and policies
- Reserve funds to supplant the risks of high grant dependency

GRANTS MANAGEMENT

Grant Funds as Percent of Total Budget



Description of Calculation

Total grant funds expenditures, divided by total district operating revenue.

Importance of Measure

Shows the magnitude of a district's reliance on additional and alternative funding sources.

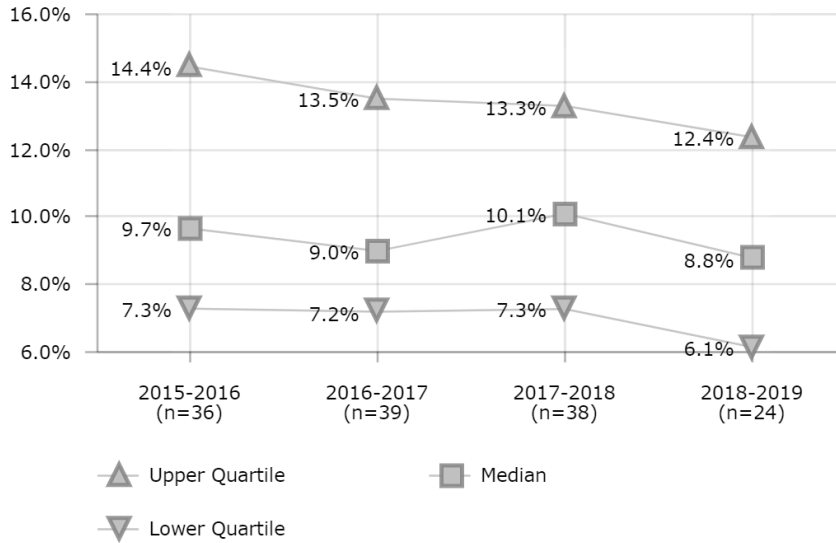
Factors that Influence

- District demographics that drive eligibility for categorical grants
- Philosophy, policies, procedures embraced by district in identifying and pursuing grants
- Local economic conditions

District	2015-2016	2016-2017	2017-2018	2018-2019
1				9.4%
2	14.4%		15.4%	
3	4.7%	9.1%		8.3%
4	12.5%	12.1%	11.2%	12.8%
7	79.7%	76.3%		
8	11.8%	11.9%	13.3%	13.6%
9	16.2%	18.6%	14.6%	15.7%
10	14.3%	11.9%	11.9%	
11	7.6%	7.7%		50.9%
12	10.0%	9.2%	8.8%	9.1%
13	8.5%		9.6%	9.8%
14	11.1%	11.5%	11.1%	12.8%
15			19.9%	
16	35.9%			44.5%
18		15.6%	15.1%	13.9%
20	8.5%	8.1%	6.8%	6.8%
23			20.7%	
25	13.7%		13.6%	51.2%
27				9.8%
28	11.6%	12.1%	10.1%	
30	18.5%	19.6%	19.2%	19.1%
32	9.8%	10.4%	10.8%	10.6%
34	20.1%			
35	8.5%	7.8%	7.3%	7.6%
37	14.4%	12.4%		
39	10.5%	10.1%		
40		10.9%	11.1%	
41	7.3%	7.4%		
43	6.4%	11.5%	9.3%	9.8%
44	10.2%	10.0%	9.8%	10.0%
45		12.1%		
46	7.8%	8.0%	8.0%	8.2%
47	7.8%	10.3%	10.4%	
48	8.5%	8.2%	8.5%	8.5%
49	7.9%	3.6%		
50		32.3%	20.7%	23.1%
51	15.1%	17.7%	18.3%	20.9%
53		11.6%	10.1%	8.1%
54	23.1%		16.7%	
55	7.5%	8.7%	7.6%	
56	33.0%		34.9%	34.9%
57		11.7%	9.9%	10.3%
58	11.1%	13.9%	12.8%	
61	47.4%		38.4%	44.2%
62	32.5%			40.2%
63	21.4%	19.4%	16.8%	15.2%
67	30.6%	31.9%	33.5%	34.1%
71	10.3%	7.4%	8.1%	
77	36.8%		43.5%	47.3%
79		7.3%	8.6%	9.0%
91	13.6%	14.7%	11.4%	
97	7.0%	13.2%	13.6%	
101	33.1%		43.2%	33.4%
431		18.3%	14.9%	
1728	37.1%	34.4%	36.5%	37.0%

GRANTS MANAGEMENT

Grant-Funded Staff as Percent of District FTEs



District	2015-2016	2016-2017	2017-2018	2018-2019
1		8.4%		
3	12.1%	7.1%	6.2%	8.1%
4	13.9%	13.2%	10.3%	4.8%
5			17.6%	
7	5.7%	6.4%	7.0%	
8	7.9%	7.9%	8.2%	8.2%
9	10.7%	7.2%	8.3%	10.4%
10	6.8%	7.7%	9.9%	
12	9.2%	10.3%	8.6%	8.8%
13	9.3%		9.0%	8.9%
14	9.4%	10.3%	8.5%	9.1%
18	14.2%	15.0%	13.1%	13.0%
20	8.9%	8.4%	6.7%	
23			17.3%	
25	0.3%	0.2%	0.6%	0.5%
27				8.8%
28			22.8%	0.6%
30	13.7%	14.1%	14.7%	15.0%
32	10.5%	10.2%	11.1%	10.9%
34	17.2%			
35	7.4%	6.4%	4.5%	3.8%
37	42.6%	40.1%		
39	6.2%	6.2%		
40		8.6%	12.5%	
41	8.1%	8.5%		
43	16.1%	15.2%	13.3%	29.6%
45		18.3%		
46	6.8%	7.1%	7.2%	7.7%
47		5.9%	8.4%	
48	8.5%	8.6%	7.4%	7.5%
49	0.0%	3.8%	0.2%	
50		29.4%	25.4%	27.0%
51	10.2%	10.9%	12.1%	13.3%
52	7.3%	7.3%	8.5%	8.4%
53	114.4%	13.1%	19.8%	20.7%
54	15.3%	17.9%	18.1%	
55	7.2%	7.2%	7.3%	
57			11.0%	3.8%
58	16.5%	17.6%		
62	37.4%			
63	14.7%	11.5%	13.1%	
66	10.0%			
67	5.7%	43.8%	49.0%	1.7%
71	14.9%	13.1%	12.4%	
79		13.1%	10.9%	11.7%
91	13.9%	13.5%	16.1%	
97	3.7%	6.1%	6.3%	
431		9.0%	6.5%	

Description of Calculation

Number of grant-funded staff (FTEs), divided by total number of district employees (FTEs).

Importance of Measure

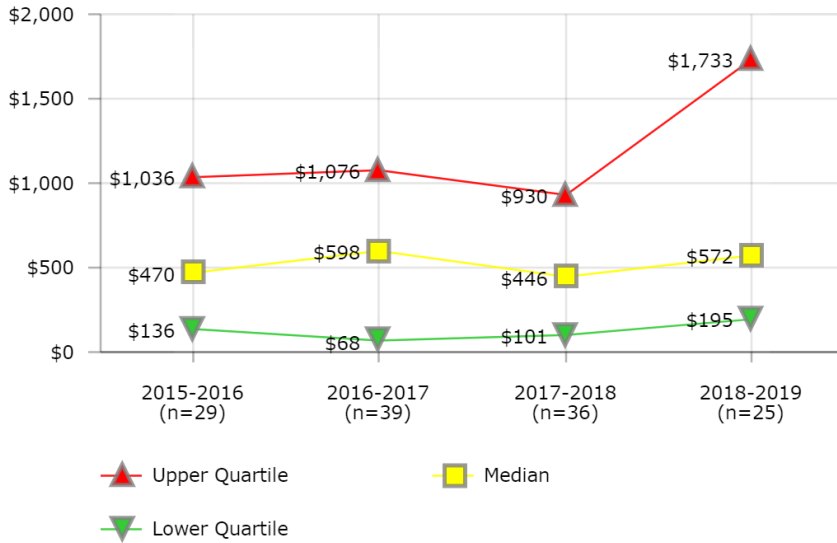
This measure shows the level of dependency on grant funds for district personnel funding.

Factors that Influence

- Amount of grant funding

GRANTS MANAGEMENT

Returned Grant Funds per \$100K Grant Revenue



Description of Calculation

Total grant funds returned (not spent), divided by total grant funds expenditures over \$100,000.

Importance of Measure

Identify and improve cycle time of grant fund availability. Ensure that no delays exist from budget approval to program implementation that the grant timelines can't be met. This measure assesses efficiency in spending grant funds that are provided by federal, state and local governments, as well as other sources such as foundations.

Factors that Influence

- Who monitors awards and the grant program coordinator to assure timeliness
- Timeliness of award notification from Federal and State entities
- School Board and administrative policies; as well as budget development and management process and procurement regulations and policies
- The timeliness of expenditures is a good indicator for the grantor to ensure that programming is occurring in time to meet grant deliverables and expected outcomes by the expiration date
- A low number of days between the date the budget is approved until the date of the first expenditure would indicate an effective use of grant funds
- A high number of days would indicate an ineffective use of supplemental resources that could limit or reduce the district's ability to obtain additional revenues in the future

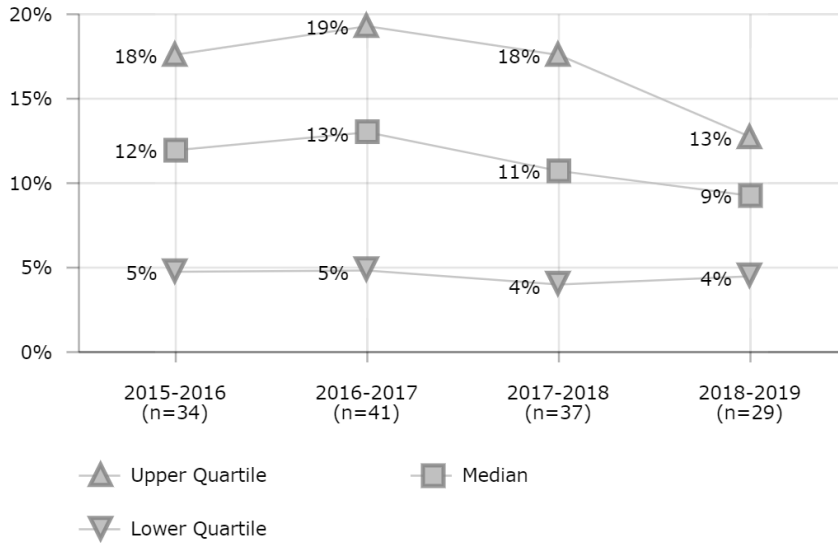
Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Baltimore City Public Schools
- Clark County School District
- Milwaukee Public Schools
- Newark Public Schools
- Norfolk School District
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1		\$480		\$572
3		\$18		\$15,809
4	\$543	\$707	\$226	\$19
5			\$125	
7			\$121	
8	\$284	\$154	\$283	\$209
9	\$44	\$1,267	\$218	\$113
10	\$136	\$10	\$56	
11	\$267	\$36		
12	\$2,296	\$926	\$1,469	\$1,299
13	\$740	\$888	\$944	\$524
14	\$1,739	\$1,673	\$1,493	\$3,842
15			\$1,065	
18	\$1,120	\$473	\$444	\$638
19		\$5,911	\$7,154	\$13,399
20	\$444	\$459	\$742	\$1,593
23			\$448	
25	\$470	\$1,230	\$1,221	\$66
27				\$195
28			\$4	\$9
30	\$61	\$68	\$52	\$0
32	\$400	\$234	\$230	\$456
35	\$1,162	\$2,167	\$1,147	\$3,092
37		\$1,076	\$472	
39	\$1,002	\$437		
40		\$2,502	\$2,359	\$2,326
41	\$42	\$31		
43		\$999	\$521	\$1,733
45	\$1,694	\$2,130		
46	\$90	\$11	\$81	\$84
48	\$943	\$549	\$603	
50		\$598		\$434
52	\$42	\$64	\$652	\$1,842
53	\$538	\$191	\$441	\$656
54	\$16	\$10	\$41	
57		\$1,321	\$916	
58	\$424	\$129	\$170	
63	\$2,609	\$1,009	\$912	\$1,047
66	\$208	\$65		
67	\$684		\$4	
71	\$9,279	\$12,484	\$45	
76		\$911		
79		\$783	\$47	\$406
91	\$1,036	\$1,030	\$1,043	
97	\$55	\$869	\$761	
431		\$12	\$70	

GRANTS MANAGEMENT

Competitive Grant Funds as Percent of Total



District	2015-2016	2016-2017	2017-2018	2018-2019
1		10%		11%
3	83%	26%		21%
4	7%	6%	3%	2%
5			35%	
7	1%	1%	1%	
8	11%	10%	11%	12%
9	11%	13%	17%	17%
10	4%		7%	
11	32%	29%		
12	18%	15%	9%	14%
13	15%	17%	11%	9%
14	4%	3%	6%	3%
15			2%	
18	28%	30%	28%	31%
19		3%	12%	11%
20	13%	19%	15%	15%
23			13%	
25	3%	3%	5%	4%
30	8%	8%	11%	7%
32	14%	15%	31%	23%
34	13%			
35	15%	10%	8%	9%
37		13%	32%	
39	15%	23%		
40		18%	20%	11%
41		2%		
43	15%	7%	3%	5%
44		5%	7%	10%
45	27%	18%		
46	7%	15%	18%	13%
47				0%
48	7%	5%	3%	1%
49		19%	11%	
50			0%	3%
52	33%	33%	30%	28%
53	1%	12%	15%	7%
54	6%	2%	6%	
55	4%	3%	3%	
57	4%	9%		8%
58	25%	22%	20%	
62	5%		3%	
63	1%	2%	6%	6%
66	13%	13%		12%
67				3%
71	96%	17%		
76		42%		
79		53%	62%	2%
91	29%	30%	36%	
97	7%	3%	2%	
431		6%	4%	

Description of Calculation

Grant funds expenditures that are from competitive grants, divided by total grant funds expenditures.

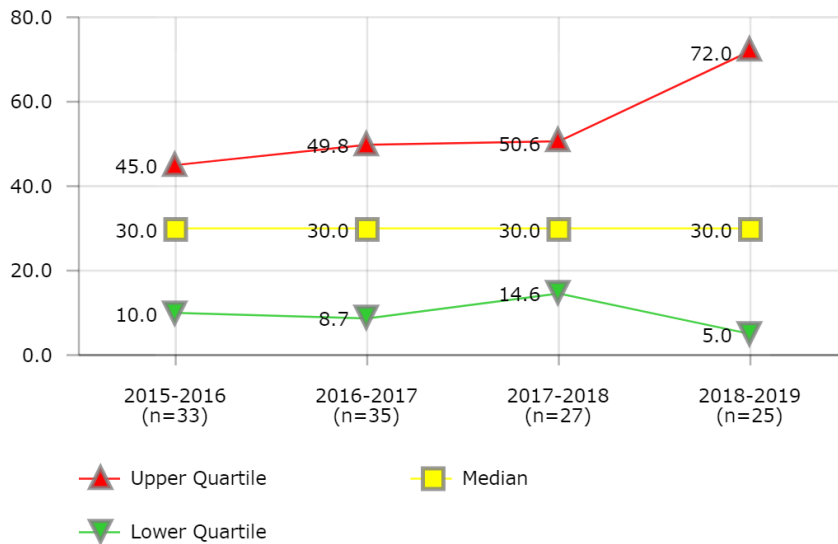
Importance of Measure

This can be used to evaluate the level of competitive grant funding in a district. Competitive grant funds can provide useful resources, but can be difficult for long-term planning and can raise concerns about sustainability.

Factors that Influence

- Experience and network of grant writers
- Level of focus on obtaining competitive grants
- Vision or district mission

GRANTS MANAGEMENT
Days to Access New Grant Funds



Description of Calculation

Total aggregate number of days that passed after new grant award notification dates to the first expenditure date, divided by the total number of new grant awards in the fiscal year.

Importance of Measure

Identify and improve cycle time of grant fund availability. Ensure that no delays exist from budget approval to program implementation that the grant timelines can't be met. This measure assesses efficiency in spending grant funds that are provided by federal, state and local governments, as well as other sources such as foundations.

Factors that Influence

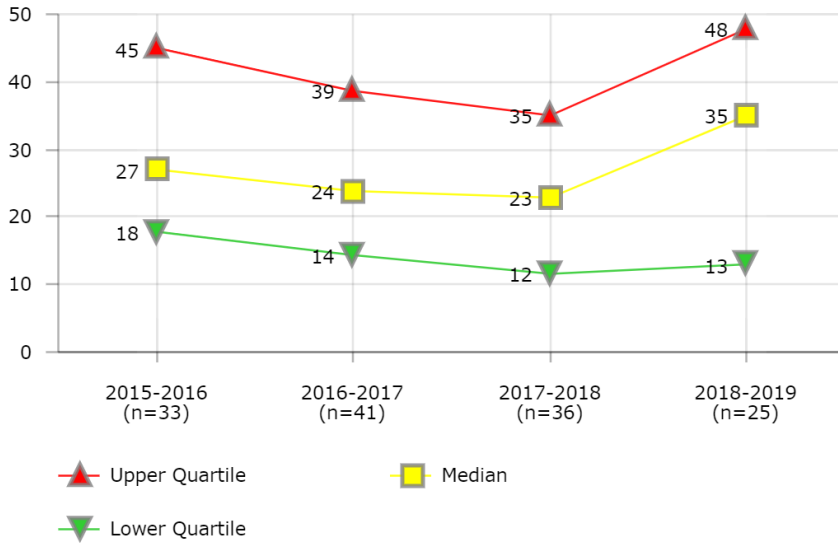
- Who monitors awards and the grant program coordinator to assure timeliness
- Timeliness of award notification from Federal and State entities
- School Board and administrative policies, as well as budget development and management process and procurement regulations and policies
- The timeliness of expenditures is a good indicator for the grantor to ensure that programming is occurring in time to meet grant deliverables and expected outcomes by the expiration date
- A low number of days between the date the budget is approved until the date of the first expenditure would indicate an effective use of grant funds
- A high number of days would indicate an ineffective use of supplemental resources that could limit or reduce the district's ability to obtain additional revenues in the future

Districts in Best Quartile (2018-2019)

- Baltimore City Public Schools
- Metropolitan Nashville Public Schools
- Norfolk School District
- Omaha Public School District
- Palm Beach County School District
- Pittsburgh Public Schools
- Toledo Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		75.3		95.7
3	45.0	25.0		154.3
4	60.0	59.0	59.0	79.5
5			30.0	
7	30.0	30.0		
8	5.0	5.0	5.0	5.0
9	10.0	10.0	10.2	10.0
10	30.0	30.0	30.0	
11	41.0	87.7		
12	64.9	49.8	56.7	51.9
13	30.0	30.0	30.0	30.0
14	174.3	103.3		
15			112.5	
18	45,766.3	60.0	90.0	235.4
19		8.6	22.2	57.4
20	60.0	60.0		30.0
23			8.0	
25	503.9	126.8		169.9
27				1.4
28				72.0
30	45.0	45.0	45.0	45.0
32	45.0	45.0	45.0	45.0
35	30.0	30.0	30.0	30.0
39	18.0	15.0		
40		47.0	24.7	18.3
41		89.9		
43	7.1	4.8	4.7	4.4
45	0.0	0.0		
46	0.2			0.2
47	30.0	30.0	30.0	0.5
48	14.0	14.0	14.6	
49	0.0			
50			6.5	13.6
53	20.0	20.0	20.0	20.0
54	0.0	0.1		
55	30.0	30.0	30.0	
57	15.0			
58	10.0	10.0		
62	30.0		30.0	
63			60.0	100.0
66	9.0	8.7		4.7
71	80.8	0.2		
79		35.0	50.6	0.5
91	0.8	2.6	3.5	
97	30.0	1.0	30.7	
431		42.9	59.1	

GRANTS MANAGEMENT
Grants Receivables Aging



District	2015-2016	2016-2017	2017-2018	2018-2019
3	48	34		
4	31	20	62	61
5			23	
7	45	45	69	
8	42	44	43	48
9	26	25	25	25
10	25	25	25	
11	81	100		
12	55	45	46	42
13	12	12	12	12
14	25	27	20	70
18	18	25	29	37
19		17	13	13
20	14	14	14	14
25	28	24	33	65
27				52
30	35	35	35	35
32	45	45	45	45
35	12	12	12	12
37		41	32	
39	18	14		
40		19	11	11
41		7		
43	31	31	7	11
45	42	42		
46	61	61	61	60
47	3	3	2	
48	10	14	13	18
50		5	10	7
51	420	19	7	81
52	32	32	35	38
53	22	22	17	17
54	11	11	15	
55	45	45	45	
57	27		10	
58	60	60		
62			60	
63	18	18	26	21
66	12	39		47
71	10	11	10	
76		19		
79		2	6	7
91	23	26	26	
97		23	23	
431		6	5	

Description of Calculation

Aggregate number of calendar days to internally process grants receivables invoices, from date grant reimbursements are filed to date invoice is submitted to the grantor, plus the aggregate number of calendar days to receive payment of submitted invoices.

Importance of Measure

Aging greater than 30 days may indicate that expenditures have not been submitted timely to funding agency or funding agency is slow in sending reimbursement thereby requiring follow-up.

Factors that Influence

- Funding agency reimbursement process
- Level of automation
- Complexity of grant
- Frequency of billing
- Payroll suspense

Districts in Best Quartile (2018-2019)

- Broward County Public Schools
- Columbus Public Schools
- Dayton Public Schools
- Detroit Public Schools
- Fort Worth Independent School District
- Pittsburgh Public Schools
- Toledo Public Schools

Procurement

Procurement improvement strategies generally fall into two categories:

1. Increasing the level of cost savings, represented broadly by Procurement Savings Ratio.
2. Improving efficiency and decreasing costs of the Purchasing department, represented broadly by Cost per Purchase Order and Purchasing Department Costs per Procurement Dollars Spent.

The first goal is assessed by the cost savings measures Competitive Procurements Ratio, Strategic Sourcing Ratio, and Cooperative Purchasing Agreements Ratio.

Purchasing department cost efficiency is generally improved through the effective automation of procurement spending. This is largely represented through P-Card Transactions Ratio and Electronic Procurement Transactions Ratio.

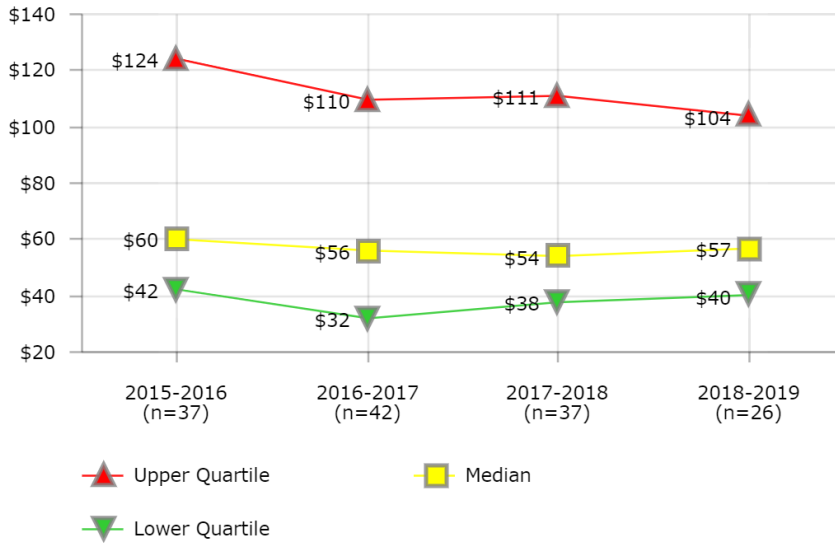
Finally, metrics of the procurement department's service level, such as Procurement Administrative Lead Time, should also be considered.

These metrics of district procurement practices should provide district leaders with a good baseline of information on how their district can improve its Procurement function. The general influencing factors that can guide improvement strategies include:

- Procurement policies, particularly those delegating purchase authority and P-Card usage
- Utilization of technology to manage a high volume of low dollar transactions
- e-Procurement and e-Catalog processes utilized by district
- P-Card reconciliation software and P-Card database interface with a district's ERP system
- Budget, purchasing, and audit controls, including P-card credit-limit controls on single transaction and monthly limits
- Utilization of blanket purchase agreements (BPAs)
- Degree of requirement consolidation and standardization
- Use of P-Cards on construction projects and paying large dollar vendors, e.g., utilities, textbook publishers, food, technology projects
- Number of highly complex procurements, especially construction

PROCUREMENT

Procurement Cost per Purchase Order



Description of Calculation

Total Purchasing department costs, divided by the total number of purchase orders that were processed by the Purchasing department, excluding P-card transactions and construction.

Importance of Measure

This measure, along with other indicators, provides an opportunity for districts to assess the cost/benefits that might result from other means of procurement (e.g., P-Card program, ordering agreements, and leveraging the consolidating requirement).

Factors that Influence

- Utilization of BPAs
- Strategic sourcing (minimizing total vendors)
- Purchasing Dept. expenditures and FTE degree of e-procurement automation and P-Card utilization
- Degree of requirement consolidation and standardization

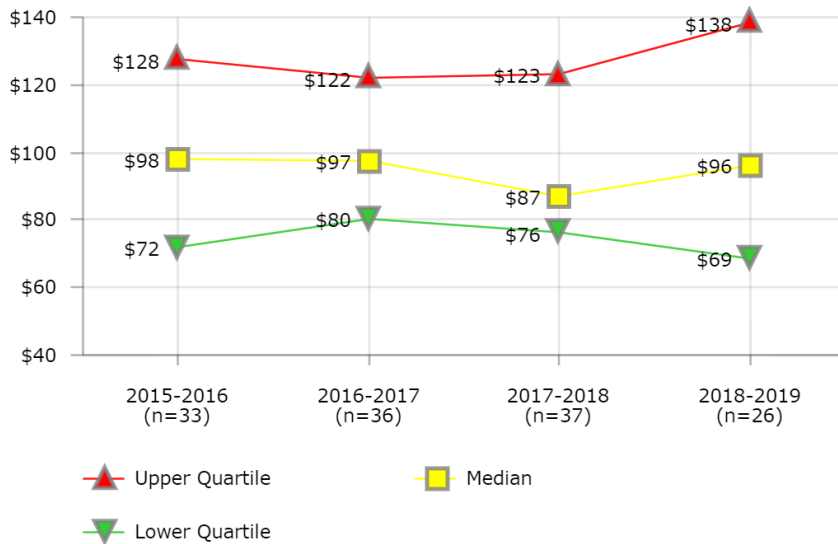
Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Charlotte-Mecklenburg Schools
- Fort Worth Independent School District
- Metropolitan Nashville Public Schools
- Milwaukee Public Schools
- Oklahoma City Public Schools
- Seattle School District 1

District	2015-2016	2016-2017	2017-2018	2018-2019
1		\$29		\$36
2	\$132	\$693		
3	\$253	\$218		\$217
4	\$127	\$110	\$109	\$106
7	\$124	\$131	\$131	\$124
8	\$42	\$46	\$47	\$46
9	\$58	\$57	\$53	\$56
10	\$44	\$27	\$40	
12	\$60	\$88	\$100	\$108
13	\$49	\$63	\$40	\$53
14	\$28	\$31		\$23
16	\$117	\$79	\$101	
18	\$42	\$40		\$55
19		\$102	\$116	
20	\$48	\$136	\$55	
25	\$120		\$96	\$66
27			\$419	\$428
28	\$146	\$113	\$127	
30	\$217		\$194	\$40
32	\$66	\$71	\$54	\$60
34	\$40			
35	\$181	\$121	\$111	\$104
37	\$232	\$242		
39	\$25	\$21		
40		\$25	\$27	\$33
41	\$47	\$31	\$31	
43	\$48	\$39	\$24	
44	\$64	\$62	\$85	\$72
45	\$84	\$73		
46	\$48	\$45	\$44	\$44
47	\$37	\$34	\$38	\$38
48	\$50	\$42	\$49	\$45
49	\$76			
50		\$49	\$45	\$57
51	\$34	\$40	\$28	\$32
52		\$55		
53	\$22	\$21	\$20	
54	\$21	\$25	\$22	
55	\$28	\$26		\$25
57		\$28	\$28	\$84
62			\$229	
63	\$80	\$63	\$33	\$110
66	\$103	\$115	\$82	
67	\$190	\$102	\$112	\$100
71	\$151	\$170	\$142	
74			\$62	
76		\$32		
91		\$132	\$149	
97			\$35	
431		\$36	\$38	

PROCUREMENT

Procurement Costs per \$100K Revenue



Description of Calculation

Total Procurement department expenditures, divided by total district revenue over \$100,000.

Importance of Measure

This measure identifies the indirect cost of the procurement function as compared to the total district revenue. Assuming all other things being equal, this is a relative measure of the administrative efficiency of district's procurement operations.

Factors that Influence

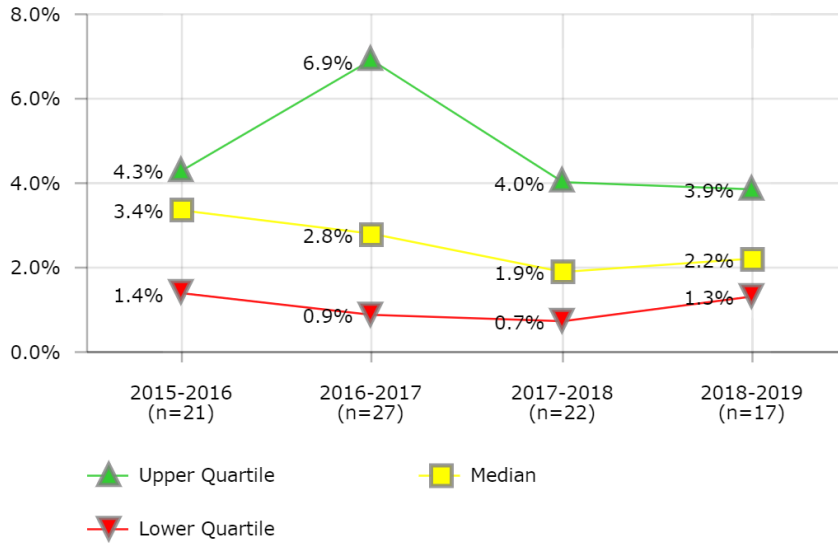
- Degree of P-Card Utilization
- e-Procurement automation
- Delegation of purchasing authority
- Purchasing office professional staff grade structure, contract services and other expenditures
- Number of highly complex procurements especially construction
- Skill level of staff

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Cleveland Metropolitan School District
- Des Moines Public Schools
- Miami-Dade County Public Schools
- Milwaukee Public Schools
- San Francisco Unified School District
- St. Paul Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1				\$79
2	\$201	\$215	\$319	
3	\$43	\$68		\$69
4	\$105	\$100	\$101	\$111
7	\$130	\$131	\$124	\$131
8	\$84	\$96	\$99	\$102
9	\$128	\$124	\$103	\$104
10	\$98	\$56	\$80	
12	\$66	\$57	\$61	\$56
13	\$132		\$89	\$101
14	\$115	\$80	\$58	\$61
16	\$166			
18		\$100		\$146
20	\$77	\$212	\$77	\$83
23			\$191	
25	\$128		\$113	\$362
27				\$248
28	\$109	\$97	\$82	
30	\$88	\$123	\$79	\$66
32	\$46	\$44	\$36	\$33
34	\$188			
35		\$223	\$188	\$176
37	\$102	\$97		
39	\$120	\$123		
40		\$99	\$123	
41	\$122	\$81	\$78	
43	\$27	\$40	\$22	
44	\$80	\$81	\$76	\$79
45		\$75		
46	\$97	\$89	\$89	\$91
47	\$91	\$93	\$87	
48	\$116	\$98	\$109	\$91
49	\$69			
50		\$106	\$84	\$73
51	\$139	\$101	\$141	\$138
53		\$97	\$86	
54	\$41		\$34	
55	\$54	\$50	\$40	
57		\$69	\$58	\$64
63	\$72	\$98	\$73	\$106
67	\$317	\$177	\$199	\$176
71	\$96	\$82	\$80	
77	\$55		\$64	\$55
91		\$121	\$128	
97		\$99	\$99	
101			\$269	\$271
431		\$175	\$162	

PROCUREMENT
Procurement Savings Ratio



Description of Calculation

Total savings from Invitations for Bids, Requests for Proposals and informal solicitations, divided by total procurement outlays (excluding P-cards and construction).

Importance of Measure

This measure compares a district's savings or "cost avoidance" that result from centralized purchasing to the total procurement spend (less P-Card spending). This measure only captures savings/ cost avoidance in a limited form since districts may realize other procurement savings that are not captured by this measure (e.g., make-buy, certain life cycle savings, service, quality, reliability, and other best value "savings" to the district). This return-on-investment measure is important as a district considers the degree of delegated purchasing authority as compared to resources devoted to a professional procurement staff and other factors, like cycle time.

Factors that Influence

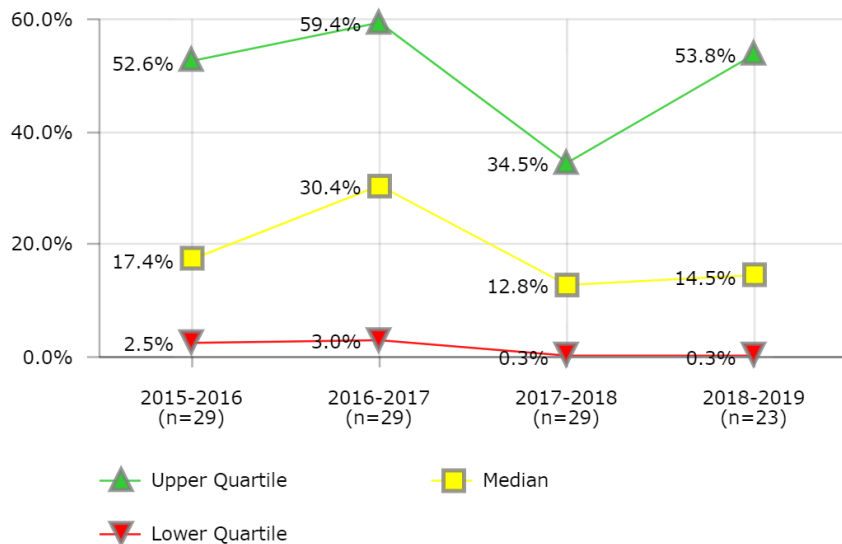
- Procurement policies, e.g., delegated purchase authority level, procurements exempted from competition, minimum quote requirements, sole source policies, vendor registration/solicitation procedures (may determine magnitude of competition)
- Utilization of technology and e-procurement tools
- Use of national or regional vendor databases (versus district only) to maximize competition, use of on-line comparative price analysis tools (comparing e-catalog prices), etc.
- Identification of alternative products/methodology of providing services.
- Degree of leveraging requirement volumes through standardization and utilization of cooperative contracting

Districts in Best Quartile (2018-2019)

- Anchorage School District
- Clark County School District
- Fresno Unified School District
- Metropolitan Nashville Public Schools
- Orange County Public School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1		2.4%		2.2%
2	1.9%	5.0%	2.7%	2.2%
3	3.7%	33.7%	0.8%	2.7%
4	0.5%	0.9%	1.3%	0.2%
7	3.4%	4.4%	4.7%	4.4%
8	0.4%	5.2%	1.1%	0.9%
9	4.3%	6.9%	11.5%	10.7%
10		0.7%	4.0%	
13		2.4%	3.8%	1.9%
14	5.6%	19.0%		
16	12.8%		3.7%	
18	0.6%	48.7%		
19			0.7%	
20		0.3%	0.6%	
27			0.4%	3.1%
32	0.1%			0.2%
35	1.9%	1.0%	0.9%	3.2%
37	7.8%	8.8%		
39	4.2%	0.5%		
40			0.3%	
41		0.1%		
43	3.0%			
46	1.4%	2.8%	1.0%	1.3%
47	3.7%	4.3%	2746.8%	3.9%
48	9.5%	7.2%	12.2%	10.0%
51			0.4%	0.5%
54		1.6%		
55	0.7%	3.0%	4.7%	1.3%
63	1.7%			
66	15.3%	32.5%		
67		0.8%	3.9%	3.9%
71	3.4%	6.5%		
76		0.6%		
91		1.5%	0.6%	
431		1.9%	2.5%	

PROCUREMENT
Strategic Sourcing Ratio



District	2015-2016	2016-2017	2017-2018	2018-2019
1		6.0%		11.0%
2	0.0%	0.0%	0.0%	0.0%
3	7.1%	84.4%		33.3%
4	18.1%	35.7%	19.7%	5.1%
7	17.4%	30.4%	33.0%	30.0%
8	64.9%	64.1%	57.5%	
9	70.0%	84.1%	87.3%	87.8%
10	76.6%	78.2%	76.9%	
12	0.0%	0.0%	0.0%	0.0%
13	92.5%	92.5%	78.8%	74.7%
14	10.9%	65.3%		79.4%
16			0.7%	
18	18.5%			
19		6.0%	12.7%	
20	0.1%	1.8%	4.5%	1.0%
23			14.2%	
25	0.0%		0.0%	46.7%
27			11.1%	73.2%
28		99.4%		
32	52.6%	40.0%	34.5%	52.2%
34	0.0%			
35	2.5%	0.0%	0.0%	0.0%
37	100.0%			
39	2.6%			
40		14.3%		
41	100.0%			
46	30.7%	32.6%	21.2%	19.8%
47	25.0%	31.0%		10.0%
48	69.3%	59.4%	75.0%	83.4%
49	0.0%			
51			0.0%	0.0%
53	0.0%	0.4%	0.6%	0.4%
54	2.8%	37.8%	40.8%	
55	13.7%	17.0%	16.6%	14.5%
57			0.3%	0.3%
63	3.4%	0.0%	0.0%	0.0%
66	23.7%	15.1%	27.4%	
67		3.0%	3.5%	53.8%
71	32.7%	48.0%	34.6%	
74			0.0%	
76		0.2%		
431		9.5%	12.8%	

Description of Calculation

Total spending utilizing strategic sourcing, divided by total procurement outlays (excluding P-cards and construction).

Importance of Measure

This measure is a strong indicator of potential cost savings that can result from leveraging consolidated requirements with competitive procurements, and minimizing spot buying and maverick spending. The National Purchasing Institute (NPI) Achievement of Excellence in Procurement Award cites an agency's use of term (annual or requirements) contracts for at least 25% of total dollar commodity and services purchases as a reasonable benchmark.

Strategic sourcing is a systemic process to identify, qualify, specify, negotiate, and select suppliers for categories of similar spend that includes identifying competitive suppliers for longer-term agreements to buy materials and services. Simply put, strategic sourcing is organized agency buying that directly affects the available contracts for goods and services, i.e., items under contract are readily accessible, while others are not.

Factors that Influence

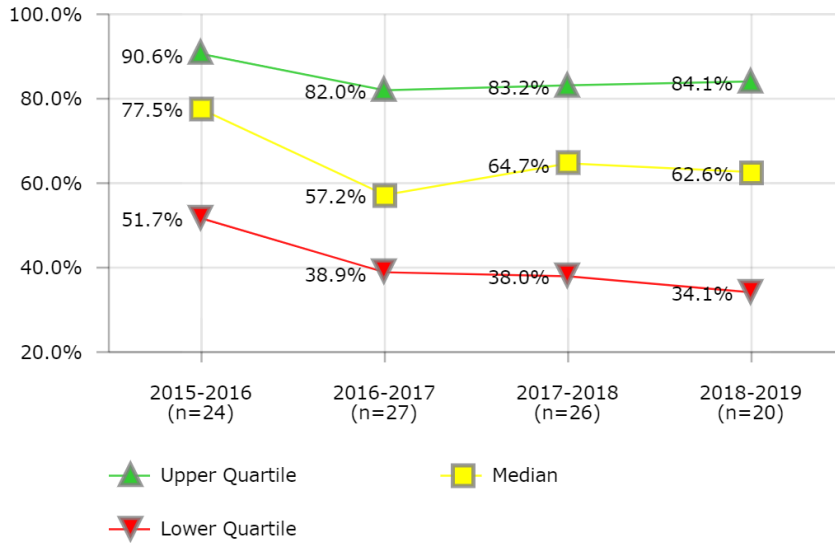
- Technical training of procurement professional staff
- Effectiveness of spend analysis regarding frequently purchased items
- Policies on centralization of procurement
- Balance between choice and cost savings
- Dollar approval limits without competitive bids

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Broward County Public Schools
- Clark County School District
- Fresno Unified School District
- Norfolk School District
- Orange County Public School District

PROCUREMENT

Competitive Procurements Ratio



Description of Calculation

Total amount of purchasing that was through competitive procurements, divided by the sum of total procurement outlays, total P-card purchasing and total construction spending.

Importance of Measure

This measure is important because competition maximizes procurement savings to the district, provides opportunities for vendors, assures integrity, and builds Board's and taxpayers' confidence in the process, which remain the cornerstone of public procurement.

Factors that Influence

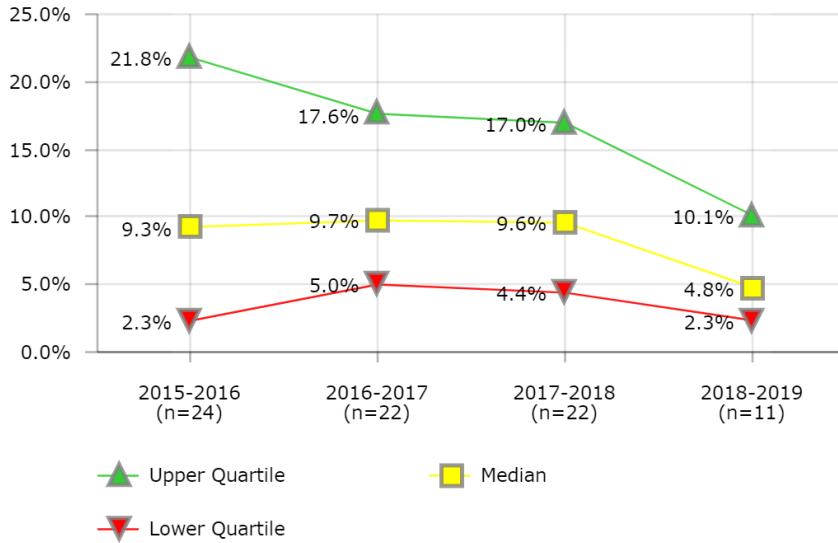
- Procurement policies governing procurements that are exempted from competition, emergency or urgent requirement procurements, direct payments (purchases without contracts or POs), minimum quote levels and requirements, and sole sourcing
- Degree of shared services that may be included in purchase dollars with other public agencies
- Vendor registration/ solicitation procedures that may determine magnitude of competition
- Professional services competition that may be exempted from competition
- In some instances, districts may have selection criteria for certain programs, such as local preference, environmental procurement, M/WBE, etc., that result in less competition
- Utilization of technology and e-procurement tools
- Market availability for competition, e.g., utilities

Districts in Best Quartile (2018-2019)

- Broward County Public Schools
- Clark County School District
- Duval County Public Schools
- Miami-Dade County Public Schools
- Palm Beach County School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1				36.1%
2	84.6%	80.4%	49.3%	
3	31.9%	74.7%	4.6%	6.6%
4	63.1%			31.7%
7	81.7%	69.6%	67.5%	56.7%
8	90.6%	95.9%	96.4%	95.2%
9	66.3%	77.2%	85.3%	90.0%
10	83.7%	89.2%	83.2%	
12	55.4%	50.0%	60.1%	36.1%
13	67.6%	75.5%	77.8%	85.7%
14		36.8%	60.3%	60.4%
16			4.5%	
18		44.1%		
20	98.6%	17.0%		22.5%
23			37.7%	
27			14.4%	77.1%
28		50.0%	43.0%	
32	98.4%	97.3%	97.2%	97.0%
34	99.1%			
35		17.2%	67.9%	32.1%
37	82.9%	38.9%		
40		5.3%	75.3%	64.9%
41	73.3%			
43	19.7%			
44	90.6%	85.7%	88.5%	90.1%
45	97.5%	41.3%		
46	89.7%	82.0%	82.2%	75.9%
47	71.8%	41.2%	91.7%	
48	96.7%	88.8%		82.5%
50			92.8%	72.2%
51			19.2%	21.5%
54	45.1%	57.2%	38.0%	
55	42.1%	47.5%	46.8%	46.3%
63	13.2%			
71	47.9%	77.4%	61.8%	
76		6.1%		
91		32.1%	7.3%	
431		91.7%	73.9%	

PROCUREMENT
Cooperative Purchasing Ratio



District	2015-2016	2016-2017	2017-2018	2018-2019
2	22.4%	37.8%	12.5%	
4	29.0%	50.0%	45.3%	10.0%
7	5.6%	9.5%	6.7%	10.1%
8	15.9%	10.8%	17.0%	
9	6.9%	10.0%	4.5%	2.3%
10	9.8%	8.6%	7.0%	
12	17.8%			
13	0.6%	6.1%		
14		14.6%	2.9%	
16	21.7%		21.8%	
18	1.2%			
19			12.7%	
20				2.1%
25	0.2%		0.8%	
27			20.1%	2.5%
34	0.1%			
35		2.3%	1.2%	0.6%
37	21.9%	24.1%		
39	19.9%	13.9%		
40		3.3%		
46	7.5%	8.9%	10.4%	9.2%
47	19.2%	26.2%	1.2%	12.5%
48	8.7%	15.1%	8.8%	
49	22.8%	2.3%	4.7%	4.2%
53	3.9%	5.7%	12.6%	
54	0.9%	2.4%	2.0%	
55	2.9%	5.0%	4.4%	4.8%
62			63.0%	
63	1.7%			
66	23.7%			
67		17.6%	16.4%	34.8%
71	56.0%	25.4%	29.4%	
76		3.4%		

Description of Calculation

Total district dollars spent during the fiscal year under cooperative agreements (including P-Cards transactions but excluding construction), divided by total procurement outlays (including P-Cards but excluding construction)

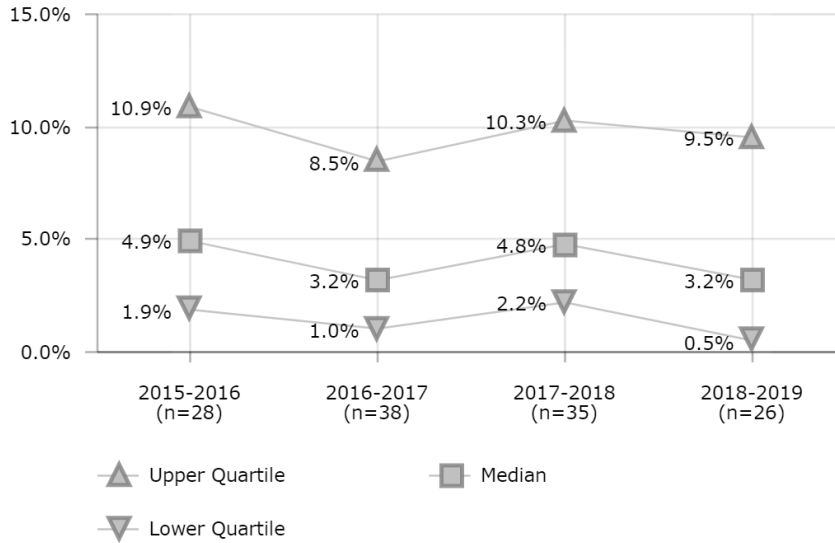
Importance of Measure

This measure assesses the use of cooperative purchasing agreements that districts can use to leverage their collective buying power to maximize savings through economies of scale. Additionally, cooperative agreements provide purchasing efficiencies by having one buyer from one district buy for many districts, and decreasing the cycle time for new requirements.

Factors that Influence

- Procurement laws and policies
- Commodity (some goods and services lend themselves to leveraging volume more than others)
- Degree of item standardization with other entities
- Number of available and eligible cooperative agreements
- Market environment (cooperative contracts may not remain competitive with market)

PROCUREMENT
P-Card Purchasing Ratio



Description of Calculation

Total dollar amount purchased using P- cards, divided by total procurement outlays (including P-card purchases).

Importance of Measure

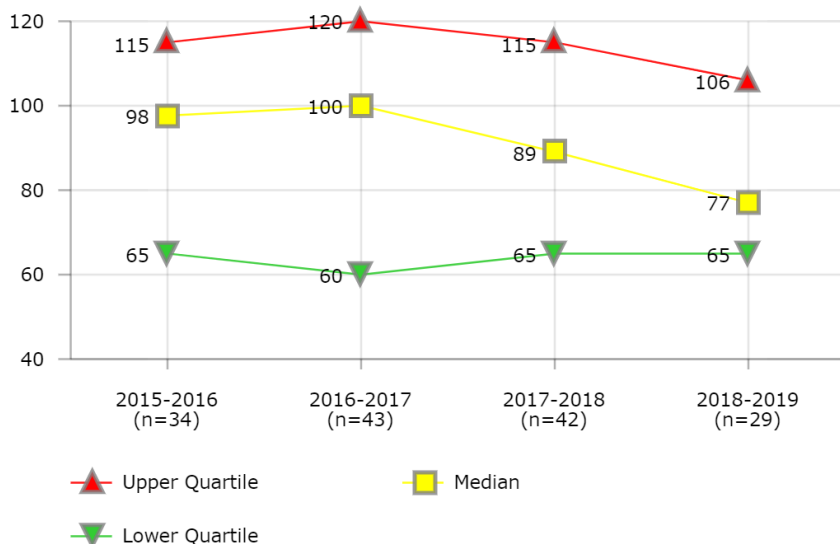
P-Card utilization significantly improves cycle times for schools, decreases procurement transaction costs as compared to a Purchase Order (2010 RPMG Research Corp cited average PO transaction cost = \$93 from requisition to check, versus P-Card transaction cost = \$22), and provides for more localized flexibility. It allows procurement professionals to concentrate efforts on the more complex purchases, significantly reduces Accounts Payable workload, and gives schools a shorter cycle time for these items. 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, and requires diligent oversight to prevent inappropriate use and spend analysis to identify contract savings opportunities.

Factors that Influence

- Procurement policies, particularly those delegating purchase authority and P-Card usage
- Utilization of technology to manage a high volume of low dollar transactions
- e-Procurement and e-Catalog processes utilized by district
- P-Card reconciliation software and P-Card database interface with a district's ERP system
- Budget, purchasing, and audit controls, including Pcard credit limit controls on single transaction and monthly limits
- Accounts Payable policies for P-Card as an alternative payment method
- Use of PCards on construction projects and paying large dollar vendors, e.g., utilities, textbook publishers, food, technology projects.

District	2015-2016	2016-2017	2017-2018	2018-2019
1		1.4%		8.0%
2		0.3%		
3	10.3%	13.6%	5.4%	7.7%
4	4.7%	7.6%	7.0%	1.7%
5		8.4%	7.9%	
7	12.1%	14.2%	12.3%	17.2%
8	4.3%	4.4%	3.9%	5.3%
9	11.8%	10.4%	10.3%	9.5%
10	7.8%	8.2%	7.6%	
12	10.2%	20.2%	13.8%	16.5%
13	9.0%	9.0%	10.2%	9.7%
14	0.4%	1.0%	0.5%	0.8%
16	5.2%	3.1%	3.2%	
19		1.4%	1.5%	
20	0.2%	1.0%	1.0%	1.7%
23			13.7%	
27			4.8%	15.8%
28	3.4%	5.4%	4.8%	
32	1.7%	3.3%	3.0%	3.2%
37	17.0%	23.4%		
39	8.8%	6.8%		
40		1.4%	5.4%	5.5%
43	14.3%	17.0%	15.1%	22.5%
44	2.1%	2.8%	2.4%	2.3%
45	1.5%	0.1%		
46	0.0%	0.0%		0.0%
47	0.2%	2.1%	89.2%	0.5%
48	4.2%	3.1%	3.0%	2.9%
49	11.4%	8.9%	12.2%	20.6%
50		0.9%	0.3%	0.1%
51		3.7%	0.2%	0.3%
53			4.8%	6.9%
54	3.1%	2.4%	2.2%	
55	2.3%	2.9%	3.2%	3.2%
57	0.2%	0.3%	0.3%	0.3%
62			7.1%	
63		0.0%	0.0%	0.5%
66	9.1%	8.5%	10.3%	
67	11.5%	0.1%	0.1%	0.1%
71	16.8%	21.0%	11.7%	
76		0.0%		
91		6.0%	2.3%	

PROCUREMENT
PALT for Requests for Proposals



District	2015-2016	2016-2017	2017-2018	2018-2019
1		102		102
2	50	50	50	50
3	115	115	115	115
4	77	77	77	77
5		126	88	
7	125	148	135	177
8	103	113	113	143
9	99	132	127	107
10	87	87	67	
12	45	45	45	55
13	153	157	169	92
14	70	80	80	80
16	108	119	90	
18	65	70		73
19		52	65	
20	40	35	120	60
23			56	
25	69		75	65
27			124	65
28	109	117	194	
32	140	140	140	227
34	61			
35	121	121	101	84
37	120	120		
39	100	100		
40		109	109	47
41	177	123	123	
44	80	70	70	70
45	115	47		
46	100	100	100	100
47	96	102	105	106
48	113	130	113	80
49	56	45	60	45
50		86	69	70
51	70	70	65	65
52		60		
53	49	49	49	49
55	22	27	27	27
57		218	122	122
62			59	
63	130	105	105	125
66	52	57	57	
67	75	75	75	75
71	101	101	94	
74			90	
76		49		
79			58	
91		62	62	
97		90	85	
431		158	131	

Description of Calculation

Average number of days to administer Requests for Proposals, from receipt of requisition to the date that the contract was issued.

Importance of Measure

This measure establishes a "cycle time" benchmark for commencing and completing the acquisition process for informal bidding or quoting. Informal bids/quotes are usually for small purchases less than the formal bid or formal proposal threshold where quotes can be obtained in writing, including electronically using e-commerce tools, via telephone, etc., and can be processed without Board approval typically using more efficient small purchase procedures.

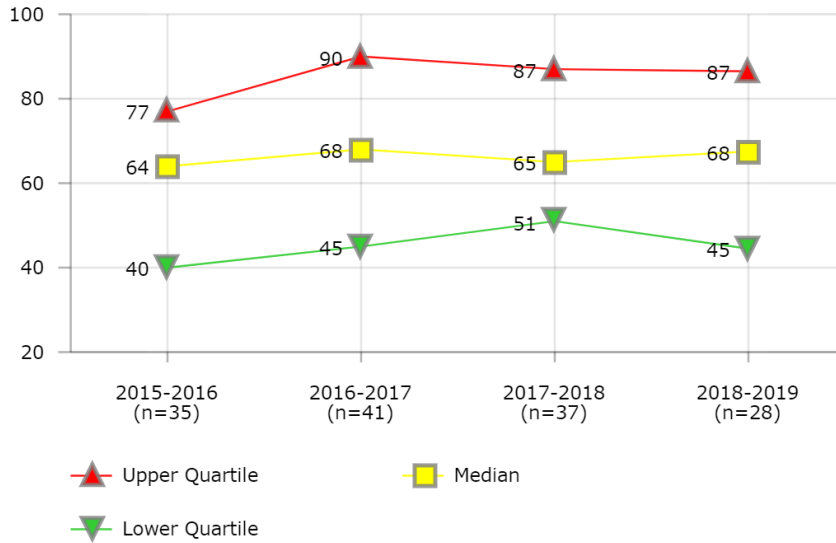
Factors that Influence

- Federal, State and local Board procurement policies and laws, including formal solicitation requirements, minimum advertising times and procurement dollar limits
- Frequency of board meetings
- Budget/FTE allocation for professional procurement staff
- Training on scope of work and specification development for contract sponsors
- The award process, including RFP proposal evaluation, vendor presentations, # of proposals, negotiations, pre-proposal conferences, site visits, and vendor reference checks
- Use of standard boilerplate bid and contract documents
- Use of current ERP and e-procurement technology to streamline internal procurement processes and external solicitation process with vendors
- Frequency of vendor protests
- Complexity and size of procurement
- Degree of commodity standardization within the district

Districts in Best Quartile (2018-2019)

- Charlotte-Mecklenburg Schools
- Cincinnati Public Schools
- Des Moines Public Schools
- Fort Worth Independent School District
- Guilford County School District
- Jefferson County Public Schools (KY)
- Newark Public Schools
- Norfolk School District
- Oklahoma City Public Schools
- Richmond City School District

PROCUREMENT
PALT for Invitations for Bids



Description of Calculation

Average number of days to administer Invitations for Bids, from receipt of requisition to the date that the contract was issued.

Importance of Measure

This measure establishes a "cycle time" benchmark for commencing and completing the acquisition process for formal competitive bidding (IFBs). It is an important measure that examines the balance between competition/ objectivity, procedural compliance, and the need to get products/services in place in a timely manner to meet customer requirements.

Factors that Influence

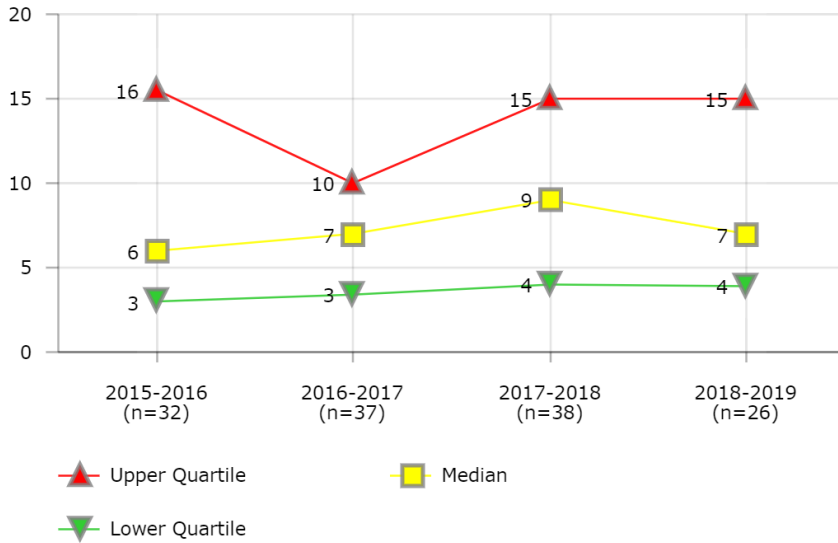
- Federal, State and local Board procurement policies and laws, including formal solicitation requirements, minimum advertising times and procurement dollar limits
- Frequency of board meetings
- Budget/FTE allocation for professional procurement staff
- Training on scope of work and specification development for contract sponsors
- The award process, including IFB evaluation, pre-bid conferences, site visit requirements, and vendor reference checks
- Use of standard boilerplate bid and contract documents
- Use of current ERP and e-procurement technology to streamline internal procurement processes and external solicitation and response process with vendors
- Frequency of vendor protests
- Complexity and size of procurement
- Degree of commodity standardization within the district

Districts in Best Quartile (2018-2019)

- Charlotte-Mecklenburg Schools
- Columbus Public Schools
- Des Moines Public Schools
- Guilford County School District
- Metropolitan Nashville Public Schools
- Richmond City School District
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1		72		72
2	30	30	30	30
3	64	264	64	64
4	33	33	33	33
5		54	51	
7	56	70	71	70
8	40	45	45	65
9	95	120	91	100
10	84	92	88	
12	23	23	29	30
13	119	117	88	80
14	70	70	70	70
16	73	80	60	
18	45	45		45
19		53	65	
20	55	55		58
23			56	
25	68		65	58
27			78	52
28	65	84		
32	165	165	165	268
34	45			
35	19	29	29	39
37	44	44		
39	75	75		
41	97	97	97	
43	51	51	51	51
44	71	71	71	71
45	30	46		
46	89	89	89	89
47	29	42	41	44
48	77	90	77	86
49	30	27	32	27
51	83	90	85	85
52		30		
53	45	87	87	87
55	27	27	27	27
57		211	122	120
62			59	
63	130	105	105	125
66	44	51	51	
67	65			105
71	64	64	59	
76		38		
79			81	
91		56	56	
97		68	65	
431		153	131	

PROCUREMENT
PALT for Informal Solicitations



District	2015-2016	2016-2017	2017-2018	2018-2019
1		15		
2	50	50	50	50
3	14	14	14	14
4	58	58	58	58
7	12	12	18	18
8	5	5	5	5
9	4	4	5	5
10	15	15	15	
12	10	10	10	25
13	2	3	4	4
14	3	3	3	3
16	90	90	7	
18	3			5
19		10	14	
20	15	3	3	15
23			4	
25	4		4	4
27			20	17
28		10	10	
32	10	10	10	10
34	3			
35	5	5	5	5
37	3	3		
39	3	5		
40				7
43	15	7	7	7
44	2	2	2	2
45	5	8		
46	3	3	3	3
47	3	3	4	4
48	32	10	32	
49	20	7	7	7
50			25	
51	7	7	7	7
52		2		
53	2	2	3	3
55	22	7	7	7
57			30	30
62			10	
63	30	90	90	3
66	4	4	4	
71	16	16	8	
76		10		
79			30	
91		10	10	
97		3	10	
431		10	12	

Description of Calculation

Average number of days, from receipt of requisition by the Purchasing department to date that purchase order issued, to process all informal solicitations.

Importance of Measure

This measure establishes a "cycle time" benchmark for commencing and completing the acquisition process for informal bidding or quoting. Informal bids/quotes are usually for small purchases less than the formal bid or formal proposal threshold where quotes can be obtained in writing, including electronically using e-commerce tools, via telephone, etc., and can be processed without Board approval typically using more efficient small purchase procedures.

Factors that Influence

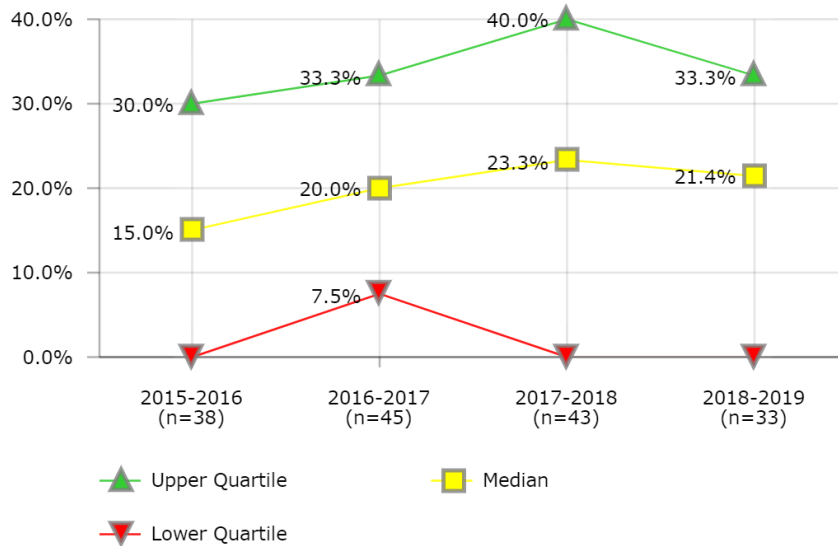
- Degree of P-Card utilization
- Extent of delegated purchase authority for small dollar procurements
- State/local laws and regulations
- Small purchase policies/procedures
- Utilization of e-procurement automation tools including online solicitation broadcasts and responses

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Baltimore City Public Schools
- Broward County Public Schools
- Duval County Public Schools
- Jefferson County Public Schools (KY)
- Metropolitan Nashville Public Schools
- St. Louis City Public School District

PROCUREMENT

Procurement Staff with Professional Certificate



Description of Calculation

Number of Purchasing department staff with a professional certificate, divided by total number of Purchasing staff (FTEs).

Importance of Measure

This measure assesses the technical knowledge of the district's procurement staff which directly affects processing time, negotiation, procedural controls, and strategies applied to maximize cost savings. The procurement function has evolved to require procurement professional staff to focus on--

- strategic issues versus transactional processing
- advanced business skills that look at agency supply chain, logistics optimization, total cost of ownership evaluations, make- versus- buy analysis, leveraging cooperative procurements, complex negotiations focusing on cost and other value-added factors, and agency spend analyses, and
- balance of service with internal controls and compliance.

Factors that Influence

- Budget/ FTE allocations to central procurement functions and employee professional development
- Procurement policies such as delegated purchasing authority, formal procurement dollar threshold, small purchase procedures, P-card utilization, etc.
- Utilization of technology and knowledge required for e-procurement and e-commerce
- Value that an organization places on its procurement functions and procedures
- Policies favoring internal promotion over technical recruitment
- Incentive pay

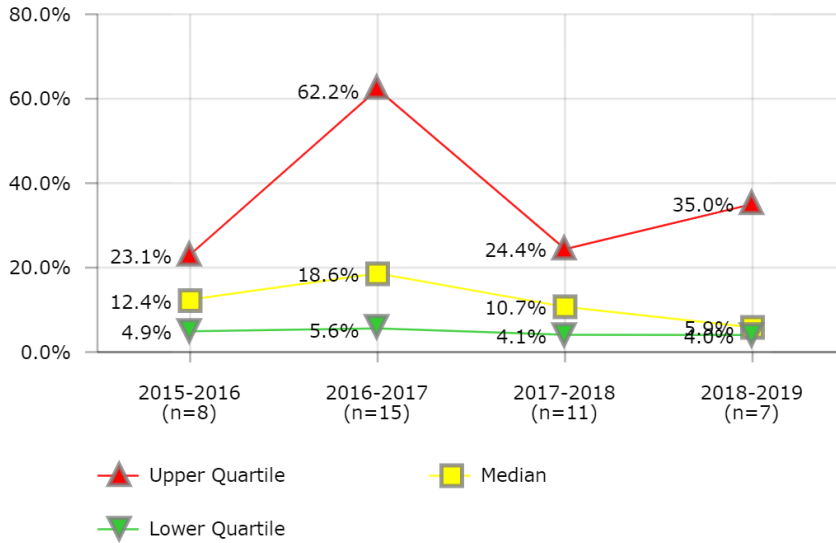
Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Baltimore City Public Schools
- Charlotte-Mecklenburg Schools
- Columbus Public Schools
- Detroit Public Schools
- Miami-Dade County Public Schools
- Norfolk School District
- Oklahoma City Public Schools
- Richmond City School District
- Seattle School District 1

District	2015-2016	2016-2017	2017-2018	2018-2019
1		40.0%		55.6%
2	50.0%	50.0%	66.7%	66.7%
3	20.0%	20.0%	0.0%	0.0%
4	11.1%	0.0%	0.0%	0.0%
5		45.5%	30.8%	
7	0.0%	0.0%	0.0%	0.0%
8	20.4%	24.5%	24.5%	23.5%
9	26.1%	27.9%	28.2%	25.6%
10	22.7%	14.3%	13.0%	
12	0.0%	25.0%	25.0%	25.0%
13	30.0%	19.4%	23.3%	30.0%
14	21.4%	14.8%	8.3%	15.4%
16	36.7%	32.1%	21.4%	
18	0.0%	8.3%		11.8%
19		0.0%	0.0%	0.0%
20	14.3%	14.3%	16.7%	20.0%
23			46.2%	
25	20.0%		22.2%	20.0%
27			62.5%	100.0%
28	45.5%	62.5%	57.1%	50.0%
30	0.0%	0.0%	0.0%	0.0%
32	15.8%	31.3%	33.3%	33.3%
34	0.0%			
35	33.3%	33.3%	40.0%	50.0%
37	22.2%	30.8%		
39	7.0%	7.5%		
40		46.2%	33.3%	30.4%
41	43.5%	62.1%	62.5%	
43	0.0%	0.0%	0.0%	0.0%
44	9.1%	9.1%	18.2%	9.1%
45	0.0%	0.0%		
46	46.2%	46.2%	46.2%	46.2%
47	10.0%	20.0%	20.0%	20.0%
48	20.0%	33.3%	25.0%	16.7%
49	50.0%	28.6%	42.9%	21.4%
50			66.7%	33.3%
51	33.3%	80.0%	57.1%	50.0%
52	0.0%	33.3%		
53	0.0%	0.0%	0.0%	0.0%
54	11.4%	13.9%	8.0%	
55	62.5%	57.1%	37.5%	37.5%
57		50.0%	25.0%	25.0%
62			33.3%	
63	0.0%	0.0%	0.0%	0.0%
66	0.0%	0.0%		
67	0.0%	0.0%	0.0%	0.0%
71	0.0%	0.0%	0.0%	
74			0.0%	
76		9.1%		
91		20.0%	20.0%	
97		15.4%	15.4%	
431		50.0%	54.5%	

PROCUREMENT

Warehouse Operating Expense Ratio



District	2015-2016	2016-2017	2017-2018	2018-2019
5		62.2%	86.6%	
7			17.6%	
8	5.8%	6.2%	7.4%	
9		8.5%		
10		117.7%		
12				35.0%
14		24.2%		
16	21.9%	21.5%	13.6%	
18				259.1%
27				5.2%
32	24.3%	27.6%	25.7%	5.9%
35	14.3%	6.9%	0.8%	2.8%
41	2.4%	2.9%		
47	10.5%	62.8%	10.3%	10.5%
55		4.1%	4.0%	4.0%
62			24.4%	
71	4.0%	18.6%	10.7%	
76		5.6%		
91	89.0%	89.2%		
431		4.1%	4.1%	

Description of Calculation

Total operating expenses of all measured warehouses (including school/ office supplies, textbooks, food service items, facility maintenance items, and transportation maintenance items), divided by total value of all issues/sales from the warehouse(s).

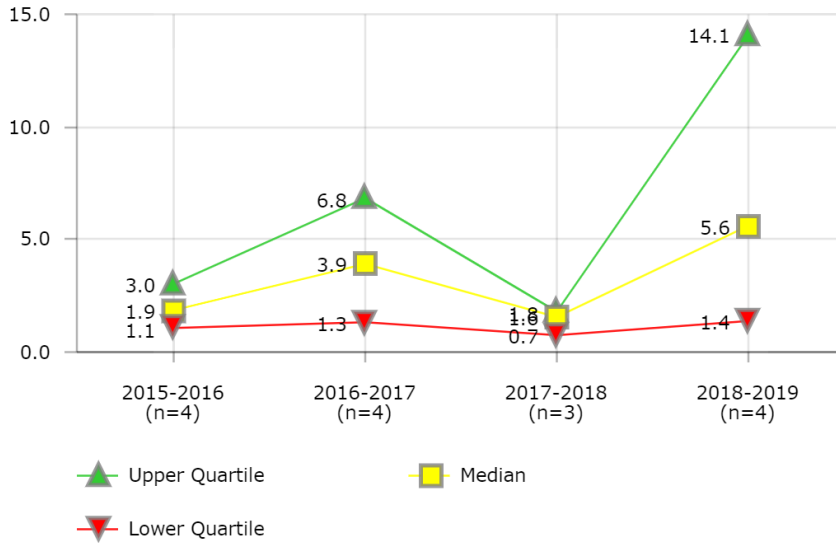
Importance of Measure

The operational cost of maintaining an intermediate storage/distribution point (warehouse) should be constantly evaluated against other alternatives as the market and other supply chain factors change in the district.

Factors that Influence

- Warehouse building utility cost and space efficiency
- Total SKUs for indirect and direct cost allocations
- Number of warehouse personnel and material handling equipment/vehicles
- Type of warehouse (environmentally controlled or not)
- Cycle time requirements

PROCUREMENT
Warehouse Stock Turn Ratio



District	2015-2016	2016-2017	2017-2018	2018-2019
8	2.6			
9		7.7		
14		6.0		
16	1.0		1.6	
18				9.3
27				18.8
35				0.8
39	1.1	0.8		
55		1.9	1.8	1.9
71	3.4			
431			0.7	

Description of Calculation

Total dollar value of annual issues/ sales at purchase price at all measured warehouses (including school/office supplies, textbooks, food service items, facility maintenance items, and transportation maintenance items), divided by the twelve-month average

Importance of Measure

Warehouse inventory turnover ratios can be used to examine opportunities for improved warehouse operations and reduced costs. Generally, total costs decline and savings rise when inventory stock turn increases. After a certain point - typically 8-10 turns - the reverse occurs, according to the National Institute of Governmental Purchasing (NIGP). Generally, an inventory turn rate of 4-6 times per year in the manufacturing, servicing, and public sector is considered acceptable. However, the overall stock turn ratio should be broken down into types of commodities, as some commodities are optimally less than 4-6 (NIGP). Viewed another way, inventory turnover ratios indicate how much use districts are getting from the dollars invested in inventory. Stock turn measures inventory health and may provide an indication of—

- Inventory usage and amount of inventory that is not turned over(“dead stock”),
- Optimum inventory investment and warehousing size, and
- Warehouse activity/movement.

Factors that Influence

- Inventory financing costs
- Inflation
- Purchasing policies

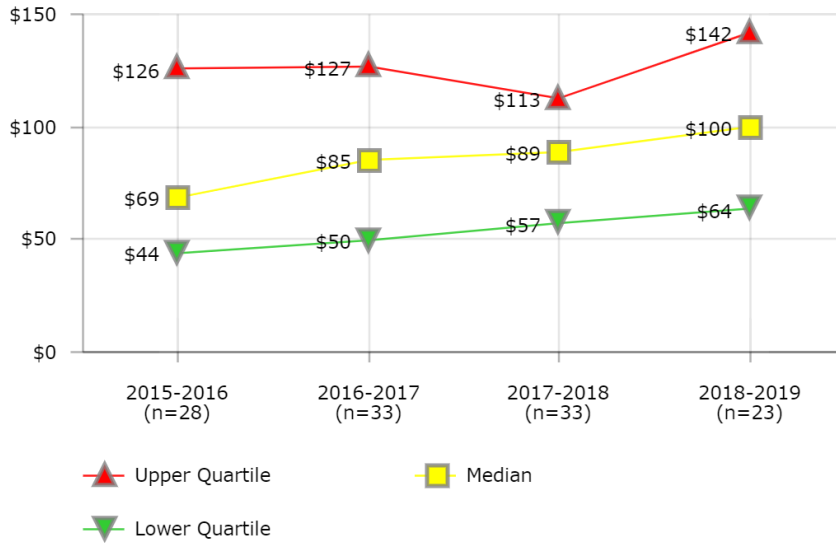
Risk Management

Performance metrics in risk management evaluate the rate of incidents that could lead to claims against the district, as well as the total cost of claims and insurance. The total cost is broadly considered with **Cost of Risk per Student**, and **Employee Incident Rate** (expressed per employee or per work hour) and could be a reflection of the general safety of a district.

Broad measures of *relative costs* and *levels of claims* for both workers' compensation and liability will help district leaders understand their performance in risk management, which may prompt such improvement strategies as:

- Searching for better medical management programs
- Improving access to quality medical care
- Providing benefits in a timely fashion
- Conducting risk factor analysis and prevention
- Adopting policies that avoid litigation
- Improving the reporting and tracking process for correcting hazardous conditions
- Revising safety protocols/guidelines/Employer Policies
- Improving injury investigations used to determine cause of injury

RISK MANAGEMENT
Cost of Risk per Student



Description of Calculation

Total liability premiums, claims and administration costs, plus total workers' compensation premiums, claims and administration costs, divided by total district enrollment.

Importance of Measure

This metric is important for long-term budget planning. School funding is based on student enrollment.

Factors that Influence

- Frequency and severity of claims filed
- Safety program's efforts to correct hazardous conditions

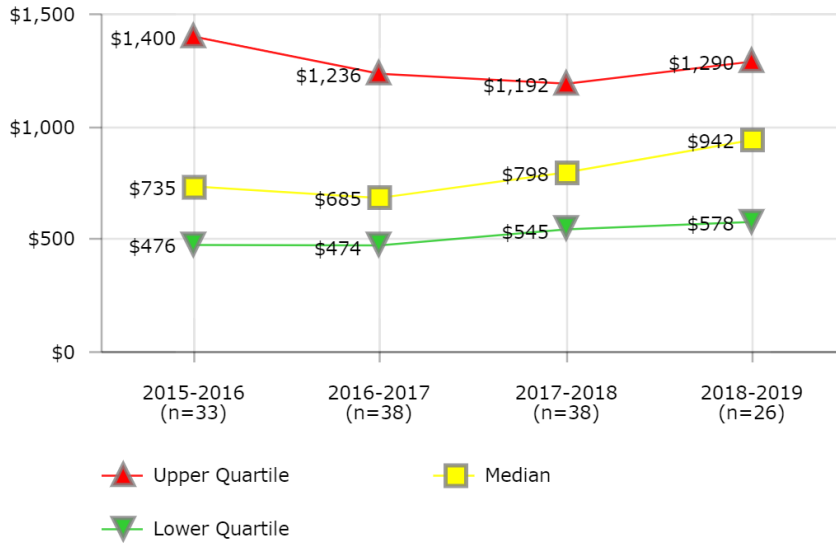
Districts in Best Quartile (2018-2019)

- Cincinnati Public Schools
- Clark County School District
- Detroit Public Schools
- Duval County Public Schools
- Palm Beach County School District
- Shelby County Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
2	\$82			
4	\$95	\$87	\$109	\$141
5			\$73	
7	\$96	\$76	\$89	
8	\$40	\$35	\$39	\$41
9	\$44	\$50	\$44	\$60
10	\$44		\$38	
12	\$155	\$160	\$224	\$203
13	\$65	\$90	\$89	\$97
14	\$148	\$138	\$113	\$142
16			\$162	
18	\$10	\$15	\$27	\$15
19			\$213	
20			\$66	\$64
23			\$105	
25		\$270		\$227
27				\$76
28	\$76	\$92	\$77	\$84
30	\$90	\$104	\$85	\$72
32	\$104	\$105	\$94	\$113
34	\$225			
35			\$183	\$209
37	\$50	\$63		
39	\$35	\$39		
40		\$117	\$106	
43	\$186	\$132	\$193	\$171
44	\$55		\$66	\$45
47		\$127	\$83	
48	\$50	\$49	\$57	\$64
49	\$59	\$39	\$46	
50		\$54	\$92	\$57
51	\$239	\$174	\$235	\$103
53		\$94	\$110	\$100
54	\$61	\$64	\$79	
55	\$12	\$11	\$32	
57		\$153	\$162	\$150
58	\$184	\$141		
62	\$176			
66	\$72	\$78		
67		\$188		\$112
71	\$36	\$50	\$47	
79		\$11	\$116	\$102
91	\$42	\$44	\$42	
97		\$85		
431		\$71		

RISK MANAGEMENT

Workers' Compensation Cost per \$100K Payroll Spend



District	2015-2016	2016-2017	2017-2018	2018-2019
1		\$310		
2	\$688			
3	\$647	\$626	\$552	
4	\$653	\$474	\$752	\$1,052
5			\$352	
7	\$735	\$579	\$702	
8	\$584	\$508	\$543	\$578
9	\$431	\$430	\$381	\$443
10	\$444		\$378	
12	\$1,546	\$1,158	\$1,255	\$1,218
13	\$749	\$1,048	\$999	
14	\$1,445	\$1,162	\$1,179	\$1,290
16			\$1,127	
18	\$97,117	\$155	\$176	\$195
19			\$1,536	\$1,594
20	\$891	\$471	\$744	\$652
23			\$987	
25	\$2,147	\$2,164	\$2,034	\$1,786
27				\$828
28		\$1,226	\$1,066	\$866
30	\$1,085	\$1,368	\$1,066	\$1,058
32	\$1,365	\$1,347	\$1,108	\$1,234
34	\$1,440			
35		\$1,519	\$1,839	\$2,064
37	\$444	\$668		
39	\$476	\$531		
40		\$1,633	\$1,574	\$2,232
41	\$395	\$299	\$236	
43	\$593	\$495	\$583	\$511
44	\$1,148	\$1,236	\$1,904	\$879
46	\$735	\$738		
48	\$335	\$399	\$434	\$455
49	\$831	\$292	\$565	\$386
50			\$571	\$243
51	\$4,984	\$3,722	\$4,248	\$1,598
52	\$644	\$531	\$647	
53		\$579	\$545	\$594
54		\$701	\$845	
55	\$140			
57		\$1,224	\$1,142	\$1,005
58	\$2,727	\$1,812		
62	\$3,170			
63	\$1,400	\$1,350	\$1,562	\$1,814
66	\$662	\$638		
67		\$1,493		\$687
71	\$408	\$420	\$353	
74			\$688	
79			\$1,192	\$1,032
91	\$328	\$374	\$346	
97		\$1,153	\$1,230	
431		\$796		

Description of Calculation

Total workers' compensation premium costs plus workers' compensation claims costs incurred plus total workers' compensation claims administration costs for the fiscal year, divided by total payroll outlays over \$100,000.

Importance of Measure

This is a metric that can be used to measure success of programs or initiatives aimed at reducing workers' compensation costs.

Factors that Influence

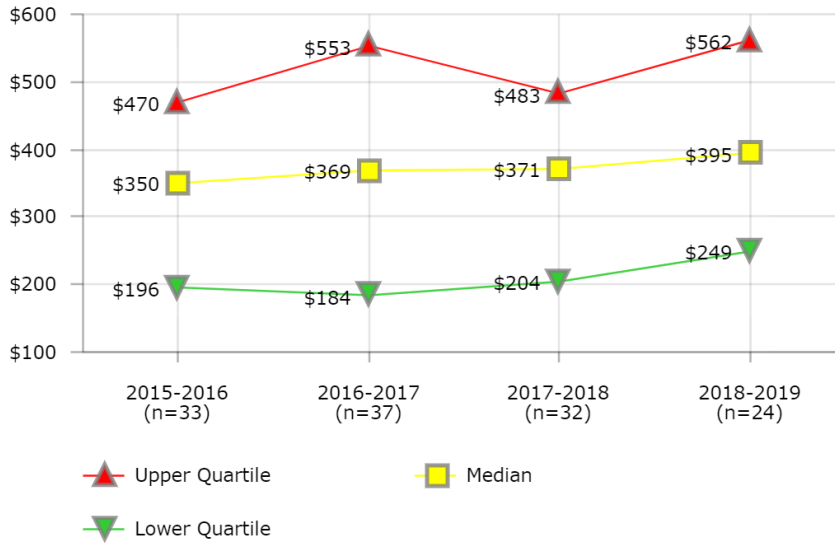
- Medical management programs
- Quality of medical care
- Litigation
- Timely provision of benefits

Districts in Best Quartile (2018-2019)

- Clark County School District
- Detroit Public Schools
- Guilford County School District
- Orange County Public School District
- Palm Beach County School District
- Pittsburgh Public Schools
- Shelby County Schools

RISK MANAGEMENT

Workers' Compensation Cost per Employee



Description of Calculation

Total workers' compensation premium costs plus workers' compensation claims costs incurred plus total workers' compensation claims administration costs for the fiscal year, divided by total number of district employees (number of W-2's issued)

Importance of Measure

This metric would most likely be used for the same purpose as the average cost per workers' compensation claim – to measure success of programs and initiatives. It can also be a way to measure trends over time or to bench mark against other employers.

Factors that Influence

- Medical management programs
- Quality of medical care
- Litigation
- Timely provision of benefits

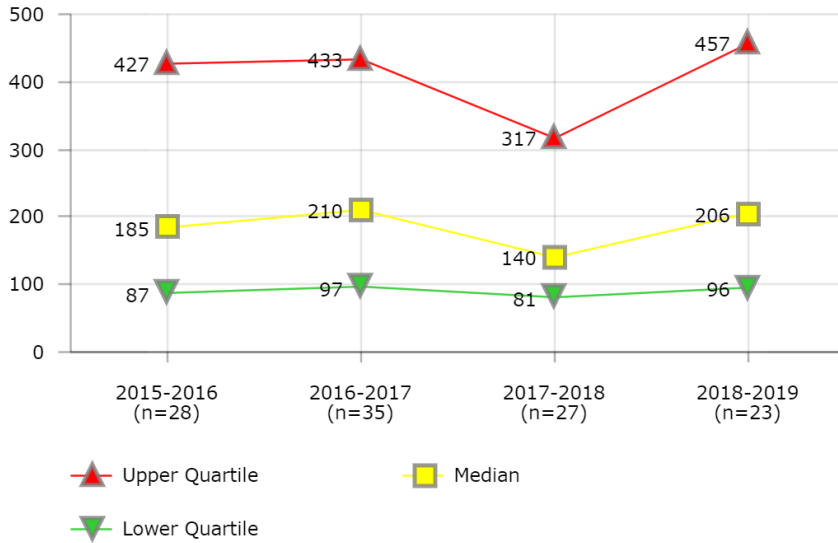
Districts in Best Quartile (2018-2019)

- Clark County School District
- Detroit Public Schools
- Norfolk School District
- Orange County Public School District
- Palm Beach County School District
- Shelby County Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		\$184		
2	\$312			
3	\$386	\$369	\$341	\$404
4	\$221	\$159	\$262	\$386
7	\$470	\$328	\$395	
8	\$198	\$174	\$195	\$208
9	\$215	\$235	\$213	\$234
10	\$196		\$186	
12	\$567	\$542	\$801	\$767
13	\$269		\$378	
14	\$452	\$364	\$360	\$409
18	\$42	\$77	\$90	\$80
20	\$350	\$177	\$280	\$264
23			\$364	
25	\$1,030	\$1,051	\$1,020	\$868
27				\$208
28	\$427	\$534	\$449	\$497
30	\$398	\$525	\$401	\$384
32	\$675	\$683	\$574	\$645
34	\$554			
35		\$697	\$844	\$957
37	\$180	\$526		
39	\$178	\$195		
40		\$612		
41	\$169	\$130	\$111	
43	\$498	\$425	\$520	\$468
44	\$391	\$441	\$486	\$311
46	\$397	\$392		
47		\$772	\$393	
48	\$162	\$148	\$165	\$178
49	\$248	\$89		
50			\$332	\$149
51	\$1,361	\$1,015		\$521
53		\$324	\$335	\$375
54	\$357	\$339	\$414	
55	\$47	\$37	\$168	
57		\$553	\$540	\$509
58	\$1,171	\$838		
63	\$732	\$704	\$850	\$998
66	\$308			
67		\$840		\$363
71	\$148	\$259	\$151	
79			\$480	\$603
91	\$174	\$184	\$172	
97		\$374	\$410	
431		\$337		

RISK MANAGEMENT

Workers' Compensation Lost Work Days per 1,000 Employees



District	2015-2016	2016-2017	2017-2018	2018-2019
1		248		
2	143			
3	546	433		540
4	93	90	142	206
7	411	318	167	
8	116	145	45	65
9	345	410	313	308
10	14		39	
13	83		49	
14	78	100	560	589
18		13	120	96
20	130	283	94	205
25	1,244	2,993		153
27				121
28	97	114	89	78
30	240	476	291	249
32	219	122	127	102
34	47			
35		1,423	842	10
37	442	1,006		
39	178	143		
40		317		
41	15	18	17	
43	636	461	684	457
44		111	103	277
46	490	494		
47		119		
48	92	95	81	76
49	78	84		
50			284	274
51	242	89	140	56
53		204	475	695
54	1,071	1,024		
55	213	210	317	
57		328	135	130
58	658	570		
63	191	45	155	206
67		374		536
79			388	482
91	33	73	51	
97		97	78	
431		325	318	

Description of Calculation

Total number of lost work days for all workers' compensation claims filed during the fiscal year divided by total number of employees (W-2's) over 1,000.

Importance of Measure

This metric could be used to track the effectiveness of medical treatment and a Return to Work program, but since this metric is using all employees in the equation instead of just the number of injured employees, a drastic change in the number of employees (reduction in force, etc.) would impact this metric without any actual change in the items being tracked.

Factors that Influence

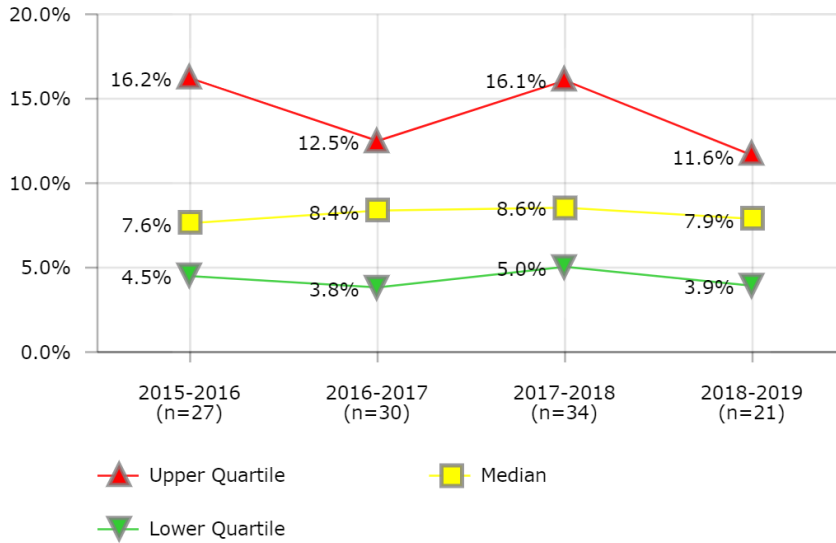
- Quality of medical care (Medical Provider Networks)
- Type of injury
- Use of nurse case managers
- Litigation
- Availability of modified or alternative work on both a temporary and permanent basis

Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Columbus Public Schools
- Oklahoma City Public Schools
- Orange County Public School District
- Palm Beach County School District
- Shelby County Schools

RISK MANAGEMENT

Liability Claims - Percent Litigated



Description of Calculation

Number of liability claims litigated, divided by total number of liability claims filed during the fiscal year.

Importance of Measure

This is an important metric as litigation is expensive and increases the cost of the claim.

Factors that Influence

- Severity of injuries
- Settlement rate
- Motivation of plaintiff

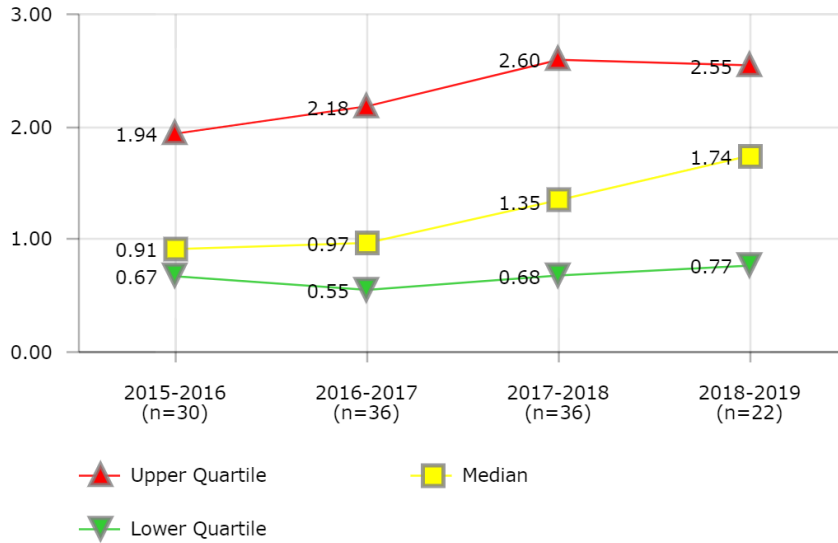
Districts in Best Quartile (2018-2019)

- Broward County Public Schools
- Clark County School District
- Dayton Public Schools
- Miami-Dade County Public Schools
- Palm Beach County School District
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
2	20.0%			
4			6.3%	1.8%
5			27.4%	
7		9.8%	24.0%	
8	2.7%	0.5%	11.3%	3.9%
9	2.3%	2.2%	1.9%	1.8%
10	4.5%		5.0%	
12	23.5%	42.1%	25.8%	15.4%
13	3.6%	2.5%	2.1%	3.9%
14	7.0%	9.3%	64.9%	7.8%
16			8.3%	
18	3.6%	3.3%	2.2%	8.0%
19			14.3%	3.7%
20			100.0%	
23			27.3%	
25	4.7%	9.5%	11.1%	25.9%
29		3.0%		
30			6.3%	
32	2.2%	1.5%	0.5%	3.6%
34	55.6%			
35			2.7%	9.5%
37	4.4%	8.8%		
39	100.0%	16.7%		
40		1.3%		
43	33.3%	66.7%	11.1%	100.0%
44	7.0%	38.5%	6.6%	10.4%
46	5.3%	5.3%	16.2%	
47	6.8%	6.0%	2.0%	7.9%
48	8.1%	7.6%	11.9%	9.8%
49	13.3%	17.6%	9.4%	14.7%
50			8.3%	53.8%
51	14.7%		8.8%	5.6%
52	16.2%	7.8%	2.2%	5.1%
53		11.9%	30.0%	11.6%
54	25.8%	20.7%	16.1%	
55	4.5%	5.5%	2.5%	4.0%
57		8.3%		
58	7.6%	3.8%		
66	11.4%			
67		12.5%		
71	9.8%	4.7%	7.4%	
79		8.4%	5.4%	
91	7.7%	13.6%	11.5%	
97		8.9%	7.4%	

RISK MANAGEMENT

Liability Claims per 1,000 Students



District	2015-2016	2016-2017	2017-2018	2018-2019
2	0.84			
3	6.71	3.54	2.58	2.69
4	1.00	0.87	0.95	1.15
5			1.87	
7	0.83	0.84	0.52	
8	1.98	2.16	1.69	1.18
9	2.16	2.58	2.40	2.40
10	1.94		1.64	
12	0.51	0.60	0.98	0.77
13	2.59	2.68	3.57	3.53
14	2.56	1.03	0.69	0.96
16			2.61	
18	1.70	1.94	1.94	1.90
19			5.30	
23			0.69	
25	1.19	0.59	0.49	0.71
27				1.61
29		0.68		
30	0.29	0.35	0.19	0.29
32	3.77	4.12	3.66	3.85
34	1.16			
35			2.94	2.36
37	1.09	1.35		
39	0.05	0.11		
40		1.80	0.68	
43	0.76	0.37	0.39	0.39
44	0.67	0.51	0.82	0.88
46	0.90	0.91	1.23	
47		4.25	3.45	
48	3.44	3.35	2.88	3.00
49	0.41	0.46	0.44	
50		0.36	0.69	0.25
51	0.83	0.65	1.47	1.89
53		1.25	1.02	2.55
54	0.76	0.52	0.55	
55	0.59	0.73	0.79	
57		2.20	2.00	1.88
58	0.93	1.87		
62	1.25			
66	0.67	1.32		
67		0.23		0.27
71	0.49	2.59	2.64	
79		4.17	3.21	2.59
91	0.61	0.69	0.41	
97		1.54	1.86	
431		0.25	0.21	

Description of Calculation

Total number of liability claims filed during the fiscal year, divided by total district enrollment over 1,000.

Importance of Measure

This metric can be used to measure your performance against other entities of similar size and with similar claims.

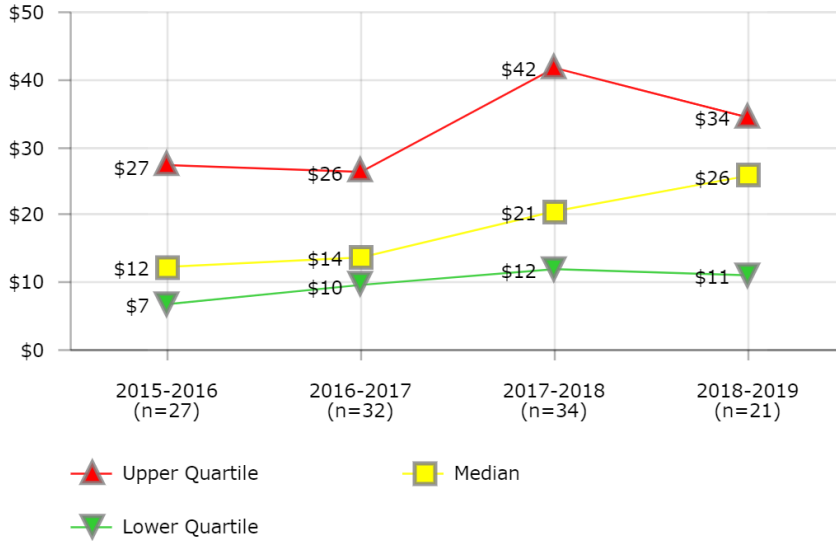
Factors that Influence

- Frequency of claims
- Type of claims
- Severity of injuries

Districts in Best Quartile (2018-2019)

- Des Moines Public Schools
- Detroit Public Schools
- Fresno Unified School District
- Milwaukee Public Schools
- Newark Public Schools
- Pittsburgh Public Schools

RISK MANAGEMENT
Liability Cost per Student



Description of Calculation

Total liability premiums, claims and administration costs, divided by total district enrollment.

Importance of Measure

Used to determine estimated costs for claims referred to outside attorneys. Can also be used to measure against other entities of similar size and with similar claims.

Factors that Influence

- Litigation
- Frequency of claims
- Injury type

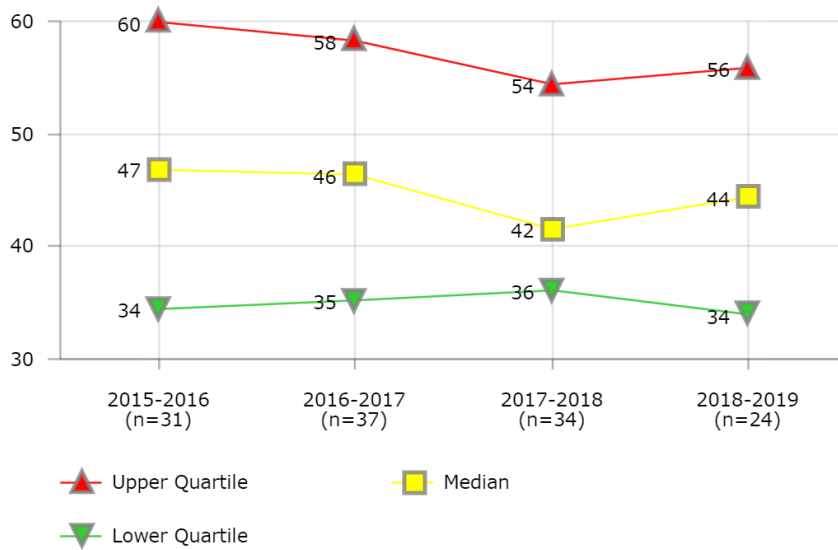
Districts in Best Quartile (2018-2019)

- Cincinnati Public Schools
- Duval County Public Schools
- Milwaukee Public Schools
- Palm Beach County School District
- Shelby County Schools
- Toledo Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
2	\$6			
4	\$51	\$55	\$56	\$60
5			\$32	
7	\$12	\$9	\$7	
8	\$8	\$7	\$7	\$7
9	\$14	\$17	\$14	\$26
10	\$10		\$8	
12	\$38	\$42	\$49	\$46
13	\$20	\$23	\$26	\$28
14	\$63	\$70	\$44	\$61
16			\$39	
18	\$4	\$4	\$15	\$4
19			\$29	
20			\$9	\$10
23			\$47	
25		\$10	\$79	\$22
27				\$26
30	\$18	\$18	\$19	\$7
32	\$14	\$13	\$18	\$26
34	\$118			
35			\$16	\$14
37	\$19	\$14		
39	\$7	\$8		
40		\$5	\$4	
43	\$79	\$42	\$74	\$63
44	\$6		\$6	\$8
47		\$14	\$22	
48	\$27	\$29	\$35	
49	\$10	\$22	\$12	
50		\$20	\$45	\$34
51	\$11	\$13	\$42	\$18
53		\$30	\$41	\$24
54	\$15	\$19	\$24	
55	\$4	\$5	\$5	
57		\$30	\$42	\$35
58	\$5	\$9		
62	\$39			
66	\$9	\$13		
67		\$34		\$28
71	\$4	\$13	\$15	
79		\$11	\$12	\$11
91	\$12	\$13	\$13	
97		\$18		
431		\$5	\$3	

RISK MANAGEMENT

Workers' Compensation Claims per 1,000 Employees



District	2015-2016	2016-2017	2017-2018	2018-2019
1		30		
2	38			
3	34	30	37	31
4	66	62	66	66
7	71	73	72	
8	52	51	51	51
9	30	31	31	32
10	40		42	
12	83	68	97	109
13	50		54	
14	35	35	35	44
18		60	28	31
20	22	22	20	21
23			40	
25	69	72	73	71
27				31
28	55	49	38	41
30	54	58	51	44
32	54	55	53	53
34	30			
35		33	31	33
37	34	63		
39	39	41		
40		46		
41	69	70	72	
43	60	55	56	52
44	61	41	47	45
46		14		
47		35	33	
48	47	41	37	45
49	44	51		
50			46	49
51	43	43	41	35
53		114	117	120
54	17	19	18	
55	41	38	36	
57		31	41	36
58	71	72		
63	49	58	60	59
66	51			
67		47		37
71	34	53	37	
79			42	61
91	32	33	29	
97		44	45	
431		42	36	

Description of Calculation

Total number of workers' compensation claims filed during the fiscal year, divided by total number of district employees (W-2's issued) over 1,000.

Importance of Measure

This is a metric that can be used to measure success of programs or initiatives aimed at reducing workers' compensation costs.

Factors that Influence

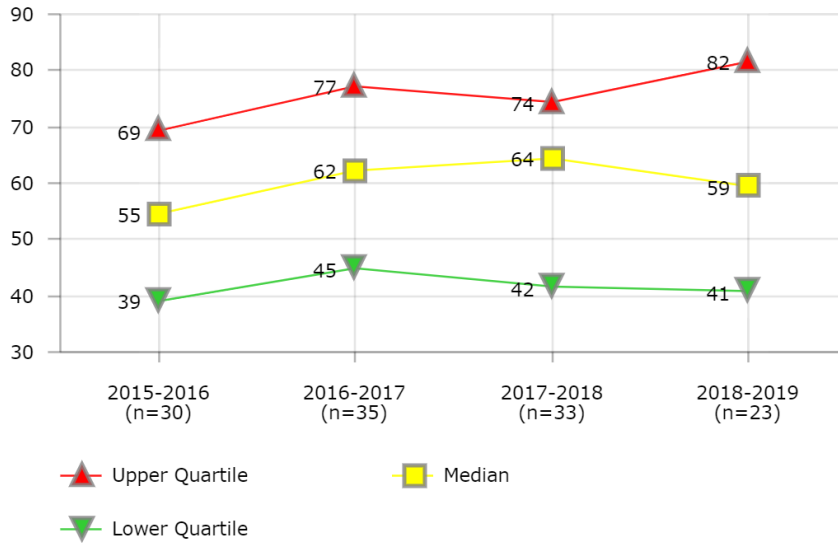
- Risk factor prevention
- Medical management programs
- Quality of medical care
- Timely provision of benefits

Districts in Best Quartile (2018-2019)

- Cincinnati Public Schools
- Clark County School District
- Columbus Public Schools
- Norfolk School District
- Shelby County Schools
- St. Paul Public Schools

RISK MANAGEMENT

Workplace Incidents per 1,000 Employees



Description of Calculation

Total number of employee workplace accidents/incidents reported during the fiscal year.

Importance of Measure

This metric would be used to measure the success of programs and initiatives aimed at reducing workplace injuries/incidents.

Factors that Influence

- Disciplinary actions
- RIF notices
- Management support
- Effectiveness of safety programs
- Safety training
- Injury investigations used to determine cause of injury
- Maintenance of facilities
- Established safety protocols/guidelines/Employer policies

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Atlanta Public Schools
- Cleveland Metropolitan School District
- Detroit Public Schools
- Jefferson County Public Schools (KY)
- Norfolk School District

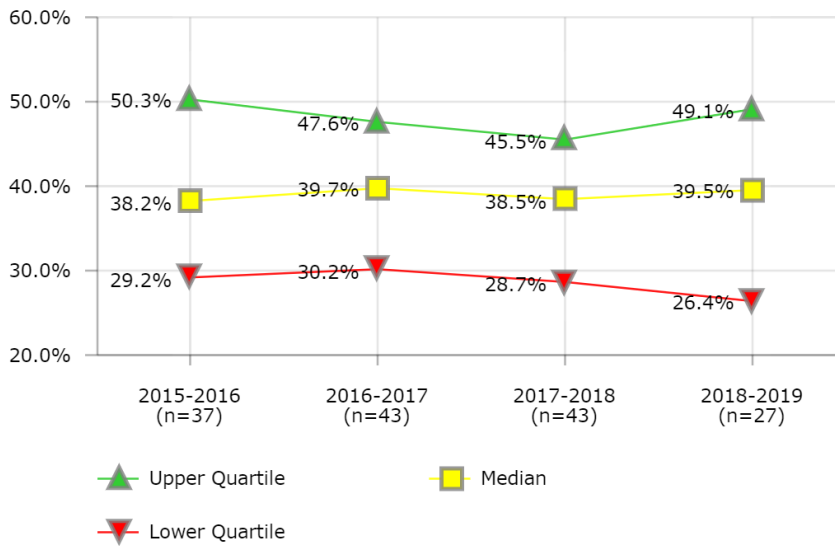
District	2015-2016	2016-2017	2017-2018	2018-2019
1		48		
2	44			
3	63	69	74	97
4	66	62	66	66
7	71	73	72	
8	83	80	82	82
9	54	57	56	59
10	60		42	
12	8	6	9	
13	87		88	
14	39	36	38	41
18		77	74	81
20	48	46	42	51
23			40	
25	69	74	73	71
27				37
28	55	49	38	41
30	38	89	89	84
32	82	80	53	54
34	35			
35		19	33	59
37	34	106		
39	63	61		
40		71		
41	69	70	72	
43	98	90	97	95
44	80	61	66	66
47		71	68	
48	47	45	49	52
49	44	30		
50			50	5
51	30	79	90	84
53		23	120	26
54	21	19	18	
55	38	36	36	
57		31	41	40
58	71	72		
63	59	75	82	59
66	54			
67		79		68
79			42	143
91	53	50	54	
97		91	95	
431		54	64	

Food Services

Performance metrics in food services measure the productivity, cost efficiency, and service levels of a district's nutritional services. Productivity is broadly assessed by **Meals per Labor Hour**, a standard measure of the industry. Cost efficiency can be determined by looking at **Food Cost per Revenue** and **Labor Cost per Revenue**. Finally, a basic measure of service levels includes meal participation rate (measured by **Breakfast Participation Rate** and **Lunch Participation Rate**, and is further measured by looking at rates by grade spans).

These measures should serve as diagnostic tools to gauge performance, as well as a guide for improvement. The importance and usefulness of each KPI is described under the "Importance of Measure" and "Factors that Influence" sections of each indicator in the pages that follow.

FOOD SERVICES
Breakfast Participation Rate (Meal Sites)



Description of Calculation

Total number of breakfast meals served, divided by total number of students with access to breakfast meals times the total number of days in the school year.

Importance of Measure

Studies show a positive correlation between breakfast and school attendance, alertness, health, behavior and academic success.

A strong breakfast program indicates a commitment by the food service program and the district leadership to preparing students to be "ready to learn" in the classroom.

Factors that Influence

- Menu selections
- Provision II and III and Universal Free
- Free/Reduced percentage
- Food preparation methods
- Attractiveness of dining areas
- Adequate time to eat

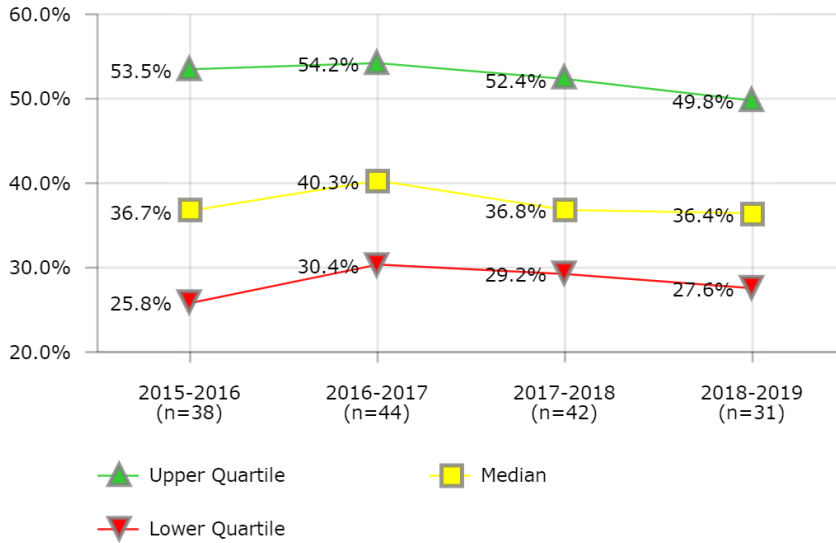
Districts in Best Quartile (2018-2019)

- Cincinnati Public Schools
- Columbus Public Schools
- Detroit Public Schools
- Newark Public Schools
- San Antonio Independent School District
- Shelby County Schools
- St. Paul Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
2	50.3%	54.7%	55.4%	
3	59.1%	58.6%	55.9%	54.2%
4	26.6%	27.0%	25.9%	30.4%
5			20.7%	
7	28.4%	27.8%	36.5%	25.5%
8	25.3%	25.9%	24.8%	26.2%
9	25.9%	31.3%	27.6%	26.4%
10	37.9%	37.9%	36.5%	
12	39.0%	40.9%	42.0%	42.5%
13	25.4%		24.1%	24.3%
14	31.5%	27.5%	28.0%	26.0%
16	35.2%		36.2%	
18		50.3%	48.5%	49.5%
19	55.3%	54.6%		
20	43.2%	50.6%	52.5%	49.1%
23	29.8%	28.4%	28.3%	
25			59.3%	59.6%
26		37.6%		
27			45.5%	44.5%
28	40.3%	42.9%	38.5%	39.5%
29		37.3%		
30	48.6%	47.6%	46.6%	44.1%
32	27.6%	26.2%	22.9%	26.2%
34	55.5%			
35	51.1%	51.4%	51.0%	49.6%
37		35.5%	38.1%	
39	54.0%	53.7%	44.7%	
41	62.2%	61.7%	60.1%	
43	53.4%	45.9%	40.6%	45.8%
44	38.3%	37.5%	38.5%	37.9%
46	35.3%	33.7%	28.7%	
47		41.6%	48.9%	
48	29.7%	29.6%	30.8%	
49	39.7%	45.3%	39.9%	
50				60.7%
51	36.5%	41.4%	39.4%	47.3%
52			34.4%	32.7%
53	41.6%	43.0%	41.1%	42.1%
54		39.7%	36.2%	
55	26.6%	28.0%	27.0%	
57		40.6%	44.9%	5.0%
58	38.2%	37.7%	39.5%	
62	27.0%			
63	58.2%	47.8%	54.4%	
66	46.9%	45.5%		
67	32.6%	32.0%		29.5%
71	23.4%	28.0%	28.2%	
74	51.1%			
76		74.1%		76.1%
79		30.2%	30.5%	32.2%
91	29.2%	27.9%	33.9%	
97		31.3%	35.0%	36.0%
431		43.7%	41.6%	

FOOD SERVICES

Breakfast Participation Rate (Districtwide)



District	2015-2016	2016-2017	2017-2018	2018-2019
2	68.1%	55.9%	57.0%	
3	60.8%	60.3%	57.0%	55.2%
4	27.1%	27.7%	26.7%	32.0%
7	23.4%	23.3%	21.2%	21.7%
8	24.9%	25.1%	24.4%	25.6%
9	27.7%	33.7%	29.8%	29.0%
10		40.8%		
11				77.8%
12	38.8%	39.0%	40.9%	46.0%
13	22.4%		23.3%	23.5%
14	33.5%	29.2%	29.4%	26.2%
16	40.8%		60.3%	43.9%
18			52.4%	54.0%
19	62.1%	60.3%		
20		54.0%	53.8%	48.3%
23	29.8%	28.4%	31.3%	
26		40.0%		
28	39.7%	42.1%	37.4%	38.3%
29		40.8%		
30	54.7%	54.8%	52.8%	51.6%
32	24.6%	20.8%	20.6%	22.4%
34	66.0%			
35	55.8%	56.0%	54.2%	54.9%
37		29.7%	40.8%	
39	57.3%	57.8%	49.0%	
41	67.6%	67.1%	66.1%	
43		54.5%	49.0%	
44	36.6%	36.6%	35.1%	36.4%
45		76.9%		
46	41.6%	39.1%	35.0%	
47		39.7%	44.3%	
48	28.9%	28.8%	30.3%	
49		43.8%		
50		87.9%	81.5%	67.4%
51	42.2%	44.8%	43.1%	42.3%
53	44.3%	44.6%	43.9%	43.9%
54	38.0%	38.0%	38.5%	
55	27.7%	28.9%	28.4%	
56	2.9%		19.5%	18.6%
57		43.9%	53.8%	49.8%
58	41.6%	40.6%	41.8%	
61	0.9%		27.8%	29.8%
62	32.8%			27.6%
63	58.5%	51.7%	63.2%	
66	53.5%	49.3%		
67	36.9%	36.1%		33.3%
71	25.6%	31.1%	31.1%	
76		84.9%		87.7%
77	1.6%		15.9%	14.8%
79		32.9%	33.5%	34.0%
91	25.8%	25.3%	25.1%	
97		32.1%	29.2%	32.3%
101	2.3%		36.3%	37.2%
1728	28.5%	28.1%	29.4%	28.6%

Description of Calculation

Total breakfast meals served, divided by total district student enrollment times the number of school days in the year.

Importance of Measure

Studies show a positive correlation between breakfast and school attendance, alertness, health, behavior and academic success.

A strong breakfast program indicates a commitment to ensuring students are ready to learn in the classroom.

Factors that Influence

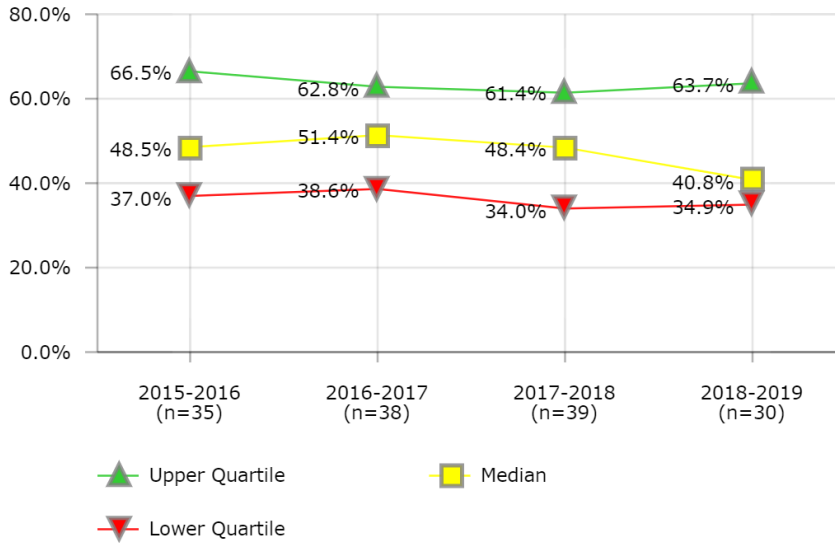
- Menu selections
- Provision II and III and Universal Free
- Free/Reduced percentage
- Food preparation methods
- Attractiveness of dining areas
- Adequate time to eat

Districts in Best Quartile (2018-2019)

- Cleveland Metropolitan School District
- Columbus Public Schools
- Detroit Public Schools
- Los Angeles Unified School District
- Milwaukee Public Schools
- San Antonio Independent School District
- Shelby County Schools
- St. Paul Public Schools

FOOD SERVICES

Breakfast F/RP Participation Rate



Description of Calculation

Number of free breakfasts plus reduced-price breakfasts served, divided by free-meal eligible plus reduced-price eligible students times the ratio of average daily attendance to the total student enrollment.

Importance of Measure

This evaluates how well a district maximizes the level of participation of its neediest students.

Factors that Influence

- Levels of poverty
- School bell times per district policy

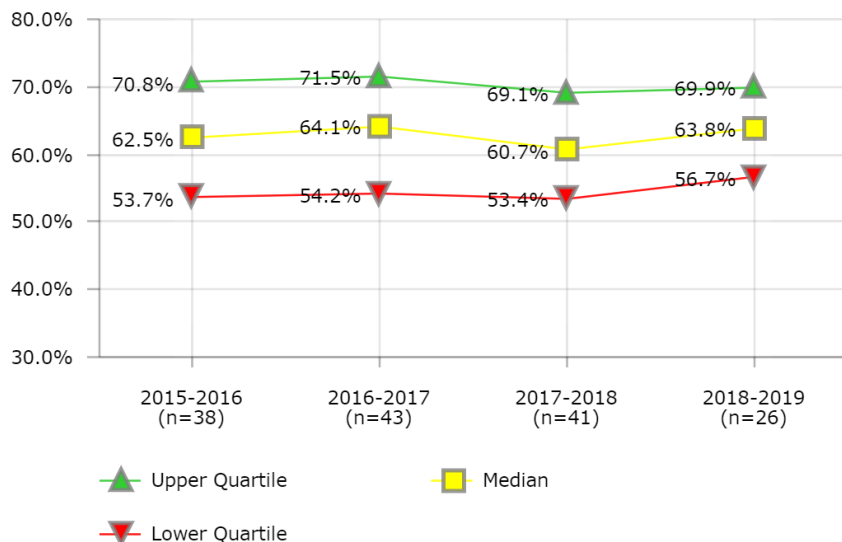
Districts in Best Quartile (2018-2019)

- Cincinnati Public Schools
- Des Moines Public Schools
- Detroit Public Schools
- Jefferson County Public Schools (KY)
- Los Angeles Unified School District
- San Antonio Independent School District
- San Diego Unified School District
- St. Paul Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
2	66.5%	68.9%	69.2%	
3	76.8%	75.5%	70.5%	73.6%
4	37.2%	38.2%	37.2%	38.4%
7	39.5%	39.3%	33.0%	36.5%
8	35.5%	36.2%	34.0%	34.9%
9	30.5%	49.5%	40.8%	37.7%
10		53.4%		
11				86.0%
12	52.6%	53.0%	48.5%	63.8%
13	29.7%		31.9%	31.1%
14	48.1%	40.1%	41.1%	40.0%
16	66.8%			70.7%
20		67.7%	61.4%	63.7%
23	53.5%	51.5%	51.7%	
28	49.4%	52.6%	48.4%	50.4%
29		51.3%		
30	55.8%	59.6%	58.5%	56.5%
32	28.4%	28.9%	28.3%	22.8%
34	67.6%			
35	58.3%	58.5%	66.6%	54.6%
37		38.7%	50.3%	
39	69.3%	70.0%	60.6%	
41		65.7%	65.9%	
43		88.0%		
44	52.0%	37.5%	51.9%	51.2%
46	24.4%	20.1%	29.4%	
47			93.6%	
48	48.5%	44.4%	43.9%	
49		79.3%		
50		89.6%	121.1%	81.2%
51	45.4%	47.1%	53.2%	41.6%
53	67.4%	71.5%	67.3%	67.4%
54	42.4%	38.3%	39.0%	
55	40.8%	39.3%	44.6%	
56	35.3%		26.6%	24.7%
57		25.8%	26.6%	25.3%
58	67.8%	62.8%	44.3%	
61	23.8%		32.3%	35.2%
62				36.9%
63	59.3%		64.7%	
66	52.5%	58.3%		
67	37.0%	34.7%		32.0%
71	41.3%	52.9%	48.8%	
76				98.0%
77	16.0%		29.5%	26.7%
79		38.6%	39.1%	39.9%
91	46.6%	46.6%	53.5%	
97		57.9%	67.4%	51.5%
101	84.4%		47.0%	45.8%
1728	68.7%	31.6%	26.6%	34.4%

FOOD SERVICES

Lunch Participation Rate (Meal Sites)



District	2015-2016	2016-2017	2017-2018	2018-2019
2	69.2%	71.5%	71.2%	
3	76.7%	76.1%	74.3%	72.6%
4	65.4%	65.6%	63.6%	48.0%
5			39.3%	
7	40.1%	42.3%		41.3%
8	53.7%	53.7%	55.5%	56.2%
9	48.2%	48.1%	44.8%	44.3%
10	60.8%	59.4%	58.0%	
12	66.6%	70.2%	66.4%	65.8%
13	58.2%		57.1%	56.3%
14	49.3%	49.2%	49.4%	50.9%
16	51.1%		49.7%	
18		71.8%	69.1%	71.2%
19	78.2%	78.7%		
20	60.3%	76.6%		69.6%
23	49.7%	49.8%	51.5%	
25			64.8%	66.9%
26		63.4%		
27			73.2%	61.9%
28	63.5%	64.2%	59.0%	60.1%
29		57.8%		
30	71.4%	69.8%	69.5%	67.4%
32	61.1%	58.9%	51.1%	57.0%
34	79.6%			
35	71.1%	71.6%	71.2%	69.1%
37		47.1%	50.0%	
39	60.7%	61.0%	52.4%	
41	75.6%	75.0%	74.2%	
43	67.7%	49.8%	70.0%	69.9%
44	53.4%	53.1%	58.3%	57.1%
46	68.6%	70.8%	65.9%	
47		55.3%	71.1%	
48	60.8%	60.7%	59.8%	
49	61.5%	61.2%	55.4%	
50				77.1%
51	65.6%	73.9%	77.4%	93.5%
52	21.2%		59.1%	56.7%
53	66.8%	68.8%	66.3%	66.7%
54		68.3%	61.1%	
55	53.7%	54.2%	53.4%	
57		67.5%	68.3%	
58	63.4%	63.5%	63.2%	
62	58.4%			
63	85.2%	69.1%	76.9%	
66	76.4%	74.4%		
67	75.0%	75.5%		72.8%
71	53.8%	50.8%	49.2%	
74	70.8%			
76		78.9%		78.5%
79		64.1%	60.1%	61.9%
91	40.6%	38.6%	38.6%	
97		56.0%	63.5%	60.9%
431		64.6%	60.7%	

Description of Calculation

Total number of lunch meals served, divided by total number of students with access to lunch meals times the total number of days in the school year.

Importance of Measure

High participation rates indicate customer satisfaction because food selections are appealing, quick to eat, and economical.

Factors that Influence

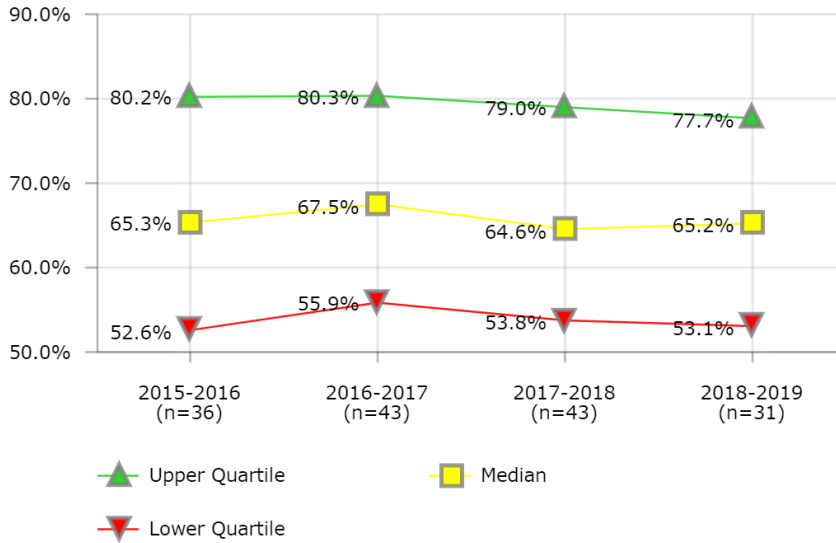
- Menu selections
- Dining areas that are clean, attractive, and "kid-friendly"
- Adequate number of Point of Sale (POS) stations to help move lines quickly and efficiently
- A variety of menu selections
- Adequate time to eat
- Food preparation methods

Districts in Best Quartile (2018-2019)

- Detroit Public Schools
- Fresno Unified School District
- Oklahoma City Public Schools
- Pittsburgh Public Schools
- San Antonio Independent School District
- Shelby County Schools
- St. Paul Public Schools

FOOD SERVICES

Lunch Participation Rate (Districtwide)



Description of Calculation

Total lunch meals served, divided by total district student enrollment times the number of school days in the year.

Importance of Measure

High participation rates indicate customer satisfaction because food selections are appealing, quick to eat, and economical.

Factors that Influence

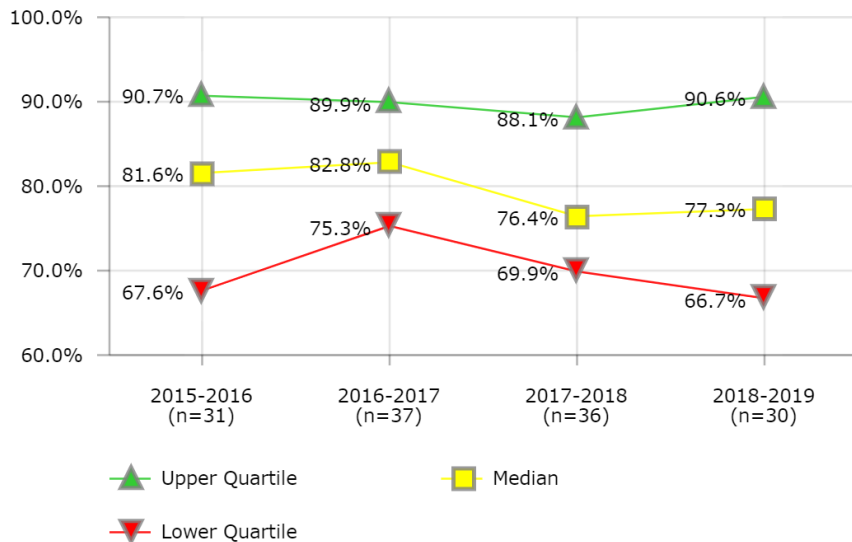
- Menu selections
- Dining areas that are clean, attractive, and "kid-friendly"
- Adequate number of Point of Sale (POS) stations to help move lines quickly and efficiently
- A variety of menu selections
- Adequate time to eat
- Food preparation methods

Districts in Best Quartile (2018-2019)

- Detroit Public Schools
- Fresno Unified School District
- Milwaukee Public Schools
- Oklahoma City Public Schools
- San Antonio Independent School District
- Santa Ana Unified School District
- Shelby County Schools
- Stockton Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
2	93.7%	73.1%	73.2%	
3	78.9%	78.3%	75.7%	73.9%
4	66.7%	67.5%	65.7%	50.6%
7	39.9%	41.9%	38.9%	41.0%
8	52.8%	52.1%	54.7%	55.1%
9	51.7%	51.9%	48.5%	48.8%
10		63.9%		
11			64.4%	67.6%
12	66.3%	67.0%	64.6%	71.2%
13	51.3%		55.0%	54.4%
14	52.4%	52.5%	51.8%	51.4%
16	59.5%		83.3%	58.5%
18			74.6%	77.7%
19	87.9%	86.9%		
20		81.7%	80.5%	68.4%
23	49.7%	49.9%	56.9%	
26		67.4%		
28	63.5%	63.0%	57.4%	58.2%
29		63.2%		
30	80.4%	80.3%	78.6%	79.0%
32	54.4%	46.9%	45.9%	48.7%
34	94.6%			
35	77.6%	78.1%	75.6%	76.5%
37		39.3%	53.6%	
39	64.4%	65.7%	57.4%	
41	82.1%	81.6%	81.6%	
43		86.6%	84.6%	
44	51.0%	51.7%	53.2%	54.8%
45		100.9%		
46	80.7%	82.1%	80.4%	
47		52.8%	64.4%	
48	59.2%	59.0%	58.8%	
50		104.0%	97.5%	85.5%
51	75.8%	80.0%	84.7%	83.6%
53	71.1%	71.4%	70.8%	69.7%
54	64.3%	65.3%	64.9%	
55	55.9%	55.9%	56.4%	
56	7.2%		53.8%	53.1%
57		73.0%	81.7%	58.6%
58	69.0%	68.4%	66.8%	
61			52.7%	50.7%
62	70.9%			68.6%
63	85.7%	74.7%	89.3%	
66	87.1%	80.5%		
67	84.7%	85.3%		82.1%
71	58.8%	56.3%	54.2%	
76		90.4%		90.5%
77			38.9%	38.7%
79		70.0%	66.0%	65.2%
91	44.4%	42.5%	42.1%	
97		57.5%	53.1%	54.6%
101	6.5%		82.0%	79.8%
1728	80.0%	77.2%	79.0%	77.8%

FOOD SERVICES
Lunch F/RP Participation Rate



District	2015-2016	2016-2017	2017-2018	2018-2019
2	91.5%	89.9%	88.9%	
3	93.3%	103.1%	102.2%	101.1%
4	83.6%	85.4%	84.4%	75.1%
7	62.7%	64.7%	55.4%	62.1%
8	74.4%	74.3%	74.4%	73.7%
9	59.0%	75.3%	70.5%	61.8%
10		84.7%		
11				78.6%
12	83.5%	87.0%	75.5%	97.6%
13	65.5%		72.8%	68.7%
14	67.6%	66.6%	67.6%	62.8%
16	93.4%			86.6%
20		105.0%	91.4%	82.5%
23	75.7%	75.3%	76.9%	
28	76.8%	76.2%	70.2%	72.3%
29		78.1%		
30	82.6%	87.8%	87.4%	86.6%
32	65.8%	67.2%	65.2%	50.6%
34	97.3%			
35	81.6%	81.9%	79.4%	76.0%
37		53.0%	68.3%	
39	79.9%	81.2%	69.5%	
41		80.0%	81.5%	
43		138.6%		
44	68.9%	54.0%	76.1%	75.4%
46	47.4%	41.9%	66.8%	
48	90.7%	82.8%	79.2%	
49		100.2%		
50		106.5%	145.3%	103.2%
51	81.8%	84.6%	104.8%	82.3%
53		111.5%	105.6%	104.7%
54	71.8%	66.1%		
55	81.8%	75.8%	87.4%	
56	99.1%		69.3%	66.7%
57				30.0%
58		105.1%	70.6%	
61	66.1%		61.4%	59.8%
62				90.6%
63	88.4%		91.8%	
66	96.4%	90.4%		
67	87.3%	83.2%		80.4%
71	91.8%	86.3%	76.7%	
76				101.4%
77	43.0%		68.0%	65.3%
79		80.0%	75.5%	75.2%
91	73.5%	71.6%	82.3%	
97		100.0%	125.6%	90.6%
101			106.3%	98.4%
1728		86.0%	70.8%	92.6%

Description of Calculation

Number of free lunches plus reduced-price lunches served, divided by free-meal eligible plus reduced-price eligible students times the ratio of average daily attendance to the total student enrollment.

Importance of Measure

High participation rates indicate customer satisfaction because food selections are appealing, quick to eat, and economical.

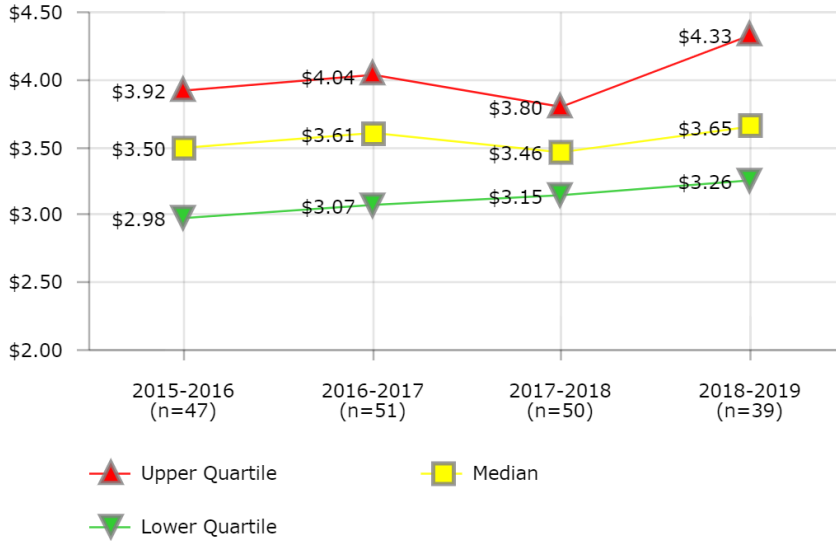
Factors that Influence

- Menu selections
- Clean, attractive dining areas with adequate seating capacity
- Provision II and III and Universal Free
- Food preparation methods
- Adequate time to eat

Districts in Best Quartile (2018-2019)

- Des Moines Public Schools
- Detroit Public Schools
- Jefferson County Public Schools (KY)
- Sacramento City Unified School District
- San Antonio Independent School District
- Santa Ana Unified School District
- St. Paul Public Schools
- Stockton Unified School District

FOOD SERVICES
Cost Per Meal



Description of Calculation

Total direct costs of the food services program, divided by the total meal count of all meal types. Breakfast meals are weighted at one-half; lunch meals at one-to-one; snacks at one-fourth; and suppers at one-to-one.

Importance of Measure

Total costs relative to meal volume demonstrates efficacy of the food service operation.

Factors that Influence

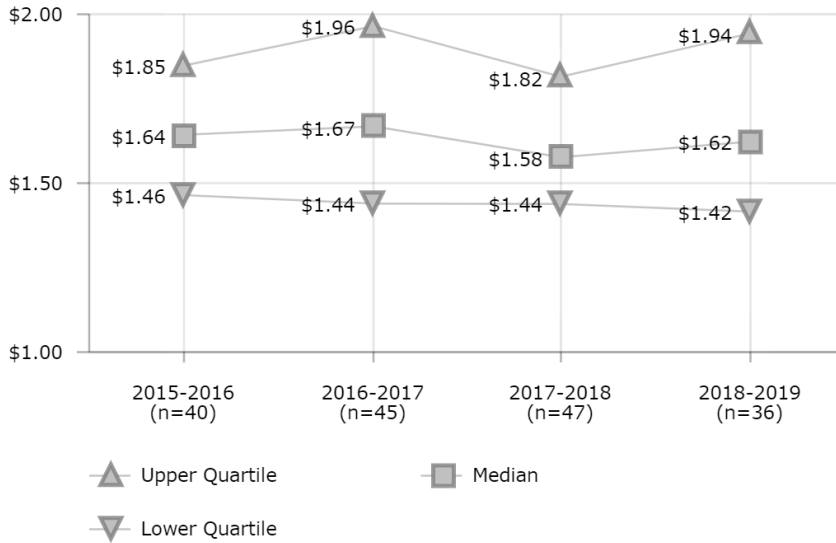
- The "chargebacks" to food service programs such as energy costs, custodial, non-food service administrative staff, trash removal, dining room supervisory staff
- Direct costs such as food, labor, supplies, equipment, etc.
- Meal quality
- Participation rates
- Purchasing practices
- Marketing
- Leadership expertise
- Meal prices
- Staffing formulas

Districts in Best Quartile (2018-2019)

- Broward County Public Schools
- Fresno Unified School District
- Long Beach Unified School District
- Los Angeles Unified School District
- Newark Public Schools
- Oakland Unified School District
- San Diego Unified School District
- San Francisco Unified School District
- Santa Ana Unified School District
- Stockton Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1	\$2.16	\$1.84		
2	\$2.43	\$3.47		
3	\$2.98	\$3.07	\$3.20	\$3.50
4	\$3.41	\$3.79	\$3.72	\$4.56
5		\$2.73	\$2.66	
7	\$3.96	\$4.11	\$4.42	\$4.41
8	\$2.88	\$3.19	\$3.28	\$3.46
9	\$2.95	\$2.93	\$3.27	\$3.42
10	\$4.01	\$4.00	\$4.09	
11				\$3.00
12	\$3.95	\$4.12	\$4.12	\$4.47
13	\$2.98	\$3.08	\$3.09	\$3.22
14	\$3.18	\$4.79	\$3.39	\$3.97
16	\$2.58	\$2.42	\$2.47	\$2.88
18	\$3.91	\$4.44	\$4.11	\$4.28
19	\$4.04	\$4.18		
20	\$3.23	\$3.08	\$3.03	\$3.46
23	\$3.48	\$3.50	\$3.94	
25			\$2.67	\$2.94
26		\$2.50	\$2.73	
27			\$3.22	\$3.53
28	\$3.50	\$3.77		\$5.77
29		\$2.79		
30	\$3.44	\$3.34	\$3.58	\$3.88
32	\$3.10	\$3.12	\$3.64	\$3.53
33	\$3.65	\$4.22		
34	\$3.52			
35	\$3.70	\$2.14	\$3.67	\$3.72
37		\$4.17	\$3.44	
39	\$3.54	\$3.58	\$3.79	\$3.52
41	\$3.54	\$3.63	\$3.58	
43	\$3.99	\$4.12	\$3.15	\$4.33
44	\$3.50	\$3.64	\$3.56	\$3.59
45	\$3.92	\$3.77		
46	\$3.00	\$3.07	\$3.41	
47	\$3.61	\$3.48	\$4.04	\$4.39
48	\$3.30	\$3.31	\$3.44	
49	\$4.04	\$4.04	\$4.52	\$4.64
50		\$3.52	\$3.43	\$4.64
51	\$4.54	\$4.04	\$4.93	\$4.68
52	\$10.54		\$3.72	\$3.94
53	\$3.68	\$3.71	\$3.77	\$3.58
54	\$2.78	\$2.91	\$3.20	
55	\$3.04	\$3.08	\$3.29	
56			\$2.84	\$2.94
57	\$4.15	\$3.61	\$15.36	\$4.96
58	\$2.84	\$2.99	\$3.46	
61			\$2.80	\$2.60
62	\$2.96		\$3.02	\$3.65
63	\$4.14	\$4.35	\$3.95	\$4.04
66	\$3.41	\$4.86	\$3.47	
67	\$2.71	\$2.87		\$3.26
71	\$3.78	\$3.70	\$3.93	
74	\$2.58			
76	\$4.16	\$4.27		\$4.13
77			\$2.71	\$2.79
79		\$3.70	\$3.77	\$4.30
91	\$3.63	\$3.70	\$3.58	
97		\$3.87	\$4.53	\$3.89
101			\$3.04	\$3.05
431		\$4.23	\$3.80	
1728	\$2.45	\$2.59	\$2.69	\$2.93

FOOD SERVICES
Food Cost per Meal



District	2015-2016	2016-2017	2017-2018	2018-2019
2	\$1.81	\$1.93		
3	\$1.26	\$1.31	\$1.44	\$1.49
4	\$1.81	\$2.16	\$1.89	\$2.41
5		\$1.25	\$1.24	
7	\$1.61	\$1.71	\$1.87	\$1.81
8	\$1.38	\$1.22	\$1.38	\$1.59
9	\$1.74	\$1.67	\$1.90	\$2.00
10	\$1.77	\$1.67	\$1.65	
11				\$1.30
12	\$1.95	\$1.98	\$1.93	\$2.07
13	\$1.34	\$1.43	\$1.37	\$1.41
14	\$1.55	\$3.61	\$1.57	\$1.82
16	\$1.05	\$0.90	\$0.89	\$1.07
18	\$1.98	\$2.13	\$2.03	\$1.96
19	\$1.99	\$2.10		
20	\$1.37	\$1.33	\$1.17	\$1.41
23	\$1.73	\$1.60	\$1.82	
25			\$1.39	\$1.49
26		\$1.34	\$1.48	
27			\$1.61	\$1.75
30	\$1.77	\$1.83	\$1.82	\$1.98
32	\$1.47	\$1.45	\$1.57	\$1.53
33	\$1.84	\$2.08		
34	\$1.59			
35	\$1.65	\$1.44	\$1.41	\$1.61
37		\$1.76	\$1.56	
39	\$1.61	\$1.61	\$1.78	\$1.80
41	\$1.71	\$1.80	\$1.74	
43	\$1.86	\$1.75	\$0.47	\$1.52
45	\$2.26	\$2.10		
46	\$1.50	\$1.53	\$1.52	
47	\$1.46	\$1.61	\$1.66	\$1.93
48	\$1.59	\$1.53	\$1.52	
49	\$2.09	\$2.35	\$2.16	\$2.37
50		\$2.20	\$2.01	\$2.74
51	\$2.18	\$2.23	\$1.83	\$1.72
52	\$5.54		\$1.81	\$1.85
53	\$1.52	\$1.44	\$1.51	\$1.37
55	\$1.44	\$1.48	\$1.50	
56		\$0.95	\$0.95	
57	\$2.32	\$1.58	\$1.66	\$2.27
58	\$1.63	\$1.67	\$1.88	
61			\$1.24	\$1.04
62	\$1.52		\$1.53	\$1.64
66	\$1.67	\$1.52	\$1.71	
67	\$1.22	\$1.33		\$1.41
71	\$1.41	\$1.41	\$1.46	
76	\$2.19	\$2.25		\$2.08
77			\$1.47	\$1.42
79		\$1.48	\$1.58	\$1.82
91		\$1.68	\$1.68	
97		\$1.74	\$2.04	\$1.57
101			\$1.63	\$1.56
431		\$1.96	\$1.78	
1728	\$1.04	\$1.15	\$1.12	\$1.16

Description of Calculation

Total food costs, divided by the total meal count of all meal types. Breakfast meals are weighted at one-half; lunch meals at one-to-one; snacks at one-fourth; and suppers at one-to-one.

Importance of Measure

Food cost is the second largest expenditure that food service programs incur.

Careful menu planning practices, competitive bids for purchasing supplies, including commodity processing contracts, and the implementation of consistent production practices can control food costs.

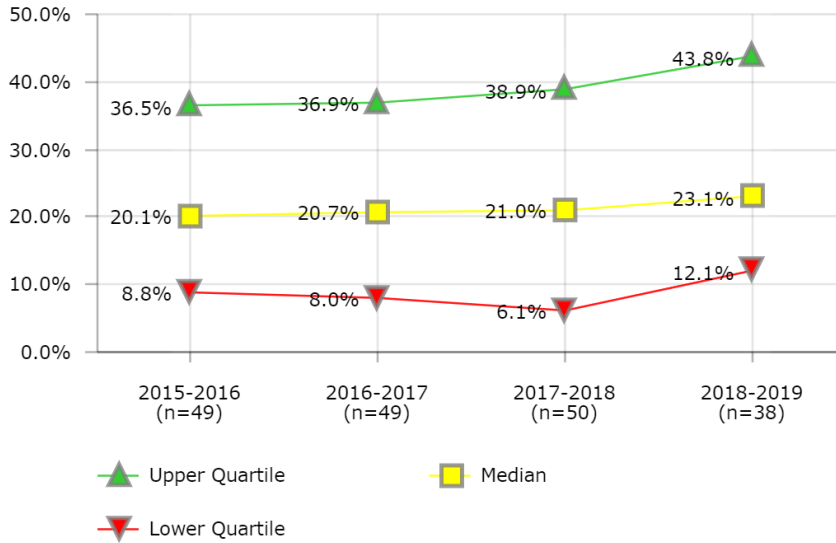
Food cost as a percent of revenue can be reduced if participation revenue is high.

Factors that Influence

- USDA Menu and Nutrient requirements
- A la carte items
- Convenience vs. Scratch Food Items
- Purchasing and production practices
- Meal prices
- Participation rates
- Use of commodities
- Use of a warehouse or drop-ship deliveries
- Theft

FOOD SERVICES

Fund Balance as Percent of Revenue



Description of Calculation

Fund balance divided by total revenue.

Importance of Measure

A positive fund balance can provide a contingency fund for equipment purchases, technology upgrades, and emergency expenses.

A "break-even" status indicates that there is just enough revenue to cover program expenses, but none left for program improvements.

Factors that Influence

- USDA allows a Food Service program to have no more than a three month operating expenses fund balance.
- Districts may have taken part or all of the Food Services Fund Balance for non-Food Service activities.
- Food Services may have funded large kitchen remodeling projects, implemented new POS systems, and thereby reduced a fund balance with a large capital outlay project

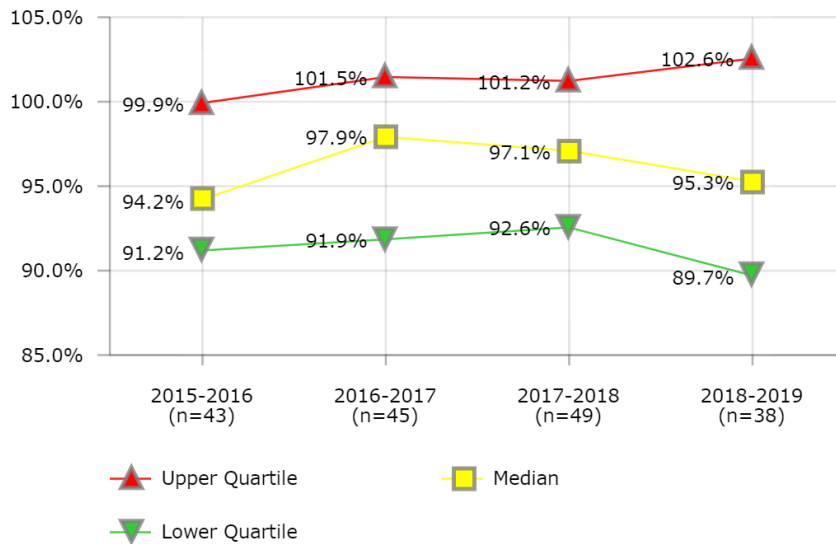
Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Cincinnati Public Schools
- Clark County School District
- Columbus Public Schools
- Detroit Public Schools
- Milwaukee Public Schools
- Norfolk School District
- Sacramento City Unified School District
- Santa Ana Unified School District
- Shelby County Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		0.0%		
2	12.8%	8.4%		
3	13.4%	20.7%	24.0%	21.6%
4	36.5%	39.7%	37.9%	35.8%
5		36.9%	32.2%	
7	-2.9%	-3.3%	1.5%	0.0%
8	32.2%	28.2%	24.5%	17.7%
9	31.9%	38.2%	48.2%	55.9%
10	24.9%	19.4%	23.2%	
11		38.8%		26.9%
12	24.9%	24.8%	25.1%	24.6%
13	45.2%	43.7%	44.2%	41.6%
14	52.4%	62.2%	71.5%	67.1%
16	1.5%	4.9%	12.7%	18.8%
18	39.4%	39.7%	44.5%	45.1%
19	98.0%	121.5%		
20	58.6%	66.0%	72.3%	76.3%
23	31.1%	32.7%	29.7%	
25			0.0%	0.0%
26			0.1%	
27			50.9%	56.0%
28	34.6%	35.0%	37.8%	31.7%
29		0.0%		
30	18.4%	30.6%	38.9%	43.8%
32	16.9%	19.1%	24.0%	20.5%
33		120.3%		
34	14.0%			
35	23.0%	22.7%	46.1%	44.6%
37		0.7%	5.2%	
39	6.8%	8.0%	19.3%	19.1%
41	19.4%	17.4%	18.4%	
43	62.6%	67.5%		
44	17.3%	13.0%	17.5%	19.7%
45	67.9%	66.3%		
46	8.1%	12.5%	11.2%	
47	33.1%		26.9%	12.1%
48	27.4%	27.6%	32.8%	
49	28.2%	6.8%	14.8%	12.6%
50		31.6%	50.1%	54.0%
51	15.0%	24.8%	6.1%	11.2%
52	8.8%		14.3%	11.6%
53	30.0%	43.9%	40.1%	42.0%
54	2.9%	1.9%	0.0%	
55	8.4%	4.8%	2.3%	
56	77.7%		7.1%	9.0%
57	3.5%	1.0%	12.6%	11.6%
58		24.3%	22.7%	
61	0.0%		0.9%	0.9%
62	54.7%		43.4%	43.9%
63	7.7%	11.5%	0.9%	21.0%
66	9.8%	1.8%	3.4%	
67	20.1%	28.5%		37.4%
71	15.0%	12.8%	12.5%	
74	4.5%			
76	19.9%	19.7%		25.0%
77	3.9%		0.5%	0.7%
79		8.9%	15.7%	16.4%
91	-1.6%	0.3%	-2.1%	
97		0.8%	1.4%	4.3%
101	88.7%		48.6%	53.3%
431		10.4%	18.8%	
1728	55.6%	60.2%	42.0%	31.7%

FOOD SERVICES

Total Costs As Percent of Revenue



District	2015-2016	2016-2017	2017-2018	2018-2019
2	69.4%	89.7%		
3	92.0%	94.9%	97.4%	103.0%
4	87.7%	88.8%	92.0%	92.4%
5		107.2%	104.8%	
7	101.9%	98.7%	98.5%	97.3%
8	99.4%	102.6%	103.0%	105.8%
9	91.2%	93.0%	91.6%	90.7%
10	102.9%	106.8%	99.5%	
11				87.1%
12	95.5%	97.9%	102.8%	102.2%
13	97.6%	100.3%	99.9%	101.8%
14	91.8%		95.3%	114.4%
16	103.9%	109.6%	96.3%	81.8%
18	95.7%	106.6%	86.6%	94.2%
19	90.3%	91.9%		
20	87.5%	88.4%	95.0%	91.9%
23	88.4%	87.8%	93.2%	
25			99.8%	110.6%
26			97.5%	
27			91.0%	88.4%
28	95.0%	108.8%		
29		85.6%		
30	91.4%	87.0%	90.3%	95.6%
32	96.0%	97.9%	94.0%	106.2%
34	52.9%			
35	87.1%		82.1%	86.7%
37		99.7%	104.8%	
39	100.4%	93.8%	90.5%	73.0%
41	102.4%	101.5%	99.0%	
43	91.7%	98.1%	67.1%	99.1%
44	94.1%	92.1%	86.5%	85.6%
45	103.0%	104.3%		
46	94.2%	95.9%	101.2%	
47		93.8%	102.4%	112.8%
48	83.3%	86.2%	84.0%	
49	103.3%	98.1%	103.1%	114.5%
50		90.4%	83.8%	95.0%
51	92.5%	99.0%	121.5%	89.7%
52	93.4%		99.7%	102.6%
53	93.9%	97.2%	95.5%	96.9%
54	95.3%	101.5%	104.1%	
55	92.1%	93.6%	95.1%	
56			97.1%	94.2%
57	107.0%	90.5%		102.9%
58	86.0%	87.1%	95.1%	
61			98.9%	98.7%
62	114.4%		107.2%	85.8%
63	97.5%	103.2%	43.1%	86.6%
66			94.0%	
67	87.7%	82.8%		89.0%
71	99.9%	97.2%	100.9%	
74	92.3%			
76	97.6%	100.8%		93.6%
77			111.7%	111.0%
79		94.5%	94.9%	102.0%
91	100.0%	98.1%	97.6%	
97		106.7%	111.5%	99.0%
101			92.6%	90.5%
431		112.2%	96.8%	
1728	94.3%	98.2%	111.6%	94.5%

Description of Calculation

Total direct costs plus indirect and overhead costs, divided by total revenue.

Importance of Measure

This measure gives an indication of the financial status of the food service program, including management company fees. Districts that keep expenses lower than revenues are able to build a surplus for reinvestment back into the program for capital replacement, technology, and other improvements. Districts that report expenses higher than revenues may either be drawing from their fund balance, or may be subsidized by the district's general fund.

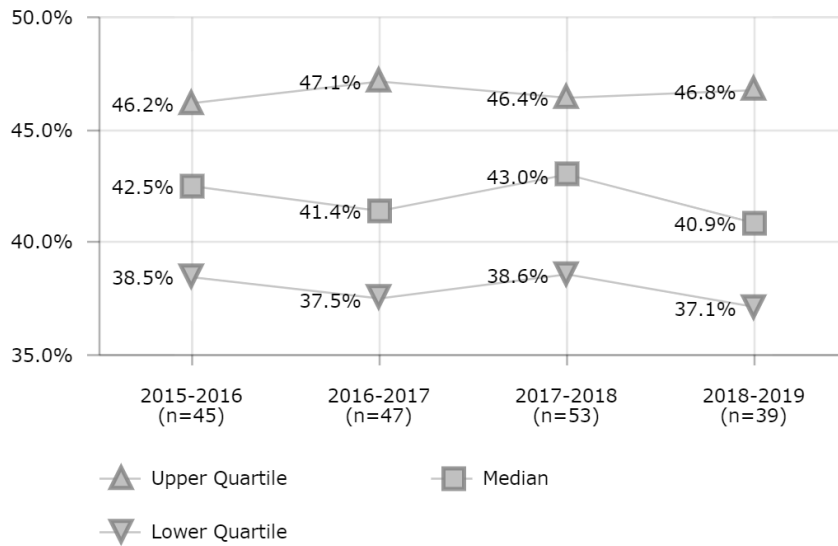
Factors that Influence

- The "chargebacks" to food service programs such as energy costs, custodial, non-food service administrative staff, trash removal, dining room supervisory staff
- Direct costs such as food, labor, supplies, equipment, etc.
- Meal quality
- Participation rates
- Purchasing practices
- Marketing
- Leadership expertise
- Meal prices
- Staffing formulas

Districts in Best Quartile (2018-2019)

- Columbus Public Schools
- Duval County Public Schools
- Fresno Unified School District
- Houston Independent School District
- Los Angeles Unified School District
- Norfolk School District
- Oklahoma City Public Schools
- Sacramento City Unified School District
- San Diego Unified School District
- St. Louis City Public School District

FOOD SERVICES
Food Cost per Revenue



Description of Calculation

Total food costs divided by total revenue.

Importance of Measure

Food cost is the second largest expenditure that food service programs incur.

Careful menu planning practices, competitive bids for purchasing supplies, including commodity processing contracts, and the implementation of consistent production practices can control food costs.

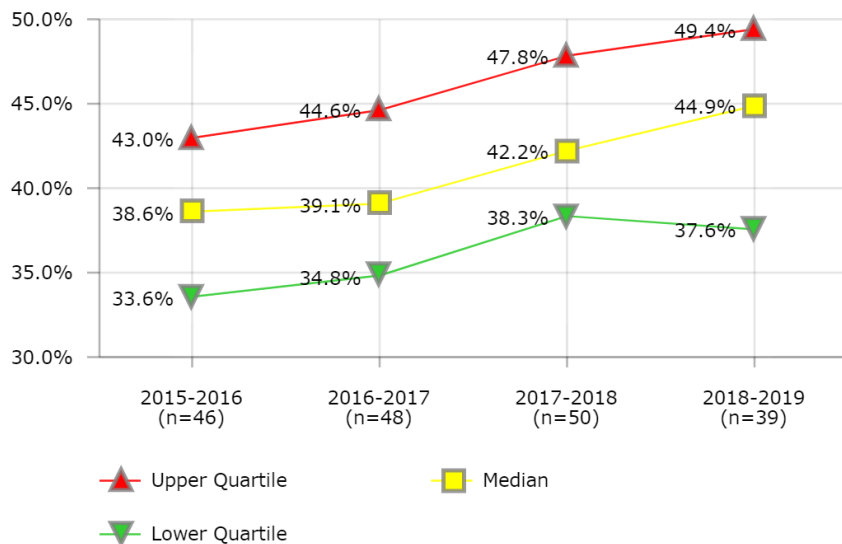
Food cost as a percent of revenue can be reduced if participation revenue is high.

Factors that Influence

- USDA Menu and Nutrient requirements
- A la carte items
- Convenience vs. Scratch Food Items
- Purchasing and production practices
- Meal prices
- Participation rates
- Use of commodities
- Use of a warehouse or drop-ship deliveries
- Theft

District	2015-2016	2016-2017	2017-2018	2018-2019
1		40.5%		
2	46.9%	47.1%		
3	36.3%	36.6%	39.7%	39.5%
4	43.2%	47.6%	43.0%	44.2%
5		47.4%	46.4%	
7	40.0%	39.4%	39.6%	38.4%
8	43.4%	38.0%	42.2%	47.4%
9	49.8%	48.2%	51.4%	51.1%
10	41.7%	39.4%	37.0%	
11			40.6%	37.7%
12	45.8%	45.7%	44.5%	43.7%
13	42.9%	45.4%	43.1%	43.1%
14	40.7%		40.9%	49.0%
16	38.5%		32.1%	30.4%
18	42.3%	44.5%	39.5%	40.8%
19	39.1%	40.2%		
20	34.5%	36.0%	34.9%	35.6%
23	41.5%	37.9%	40.7%	
25			52.0%	55.9%
26		27.0%	52.8%	
27			43.3%	40.9%
28	10.2%	25.2%	47.7%	41.3%
29		4.0%		
30	45.7%	45.5%	43.9%	46.9%
32	44.1%	43.7%	38.9%	44.7%
33		51.4%		
34	23.8%			
35	38.9%	30.3%	31.6%	37.4%
37		41.1%	46.4%	
39	42.5%	41.2%	38.6%	37.1%
41	48.1%	49.0%	46.7%	
43	42.8%	41.7%	10.0%	34.2%
44	5.6%	6.3%	5.1%	6.1%
45	55.4%	54.1%	50.7%	
46	45.4%	45.9%	44.7%	
47	39.2%	41.4%	41.2%	48.8%
48	38.7%	38.9%	36.1%	
49	50.3%	53.1%	45.7%	51.8%
50		53.1%	46.7%	53.9%
51	43.9%	53.3%	44.6%	32.6%
52	46.2%		46.8%	46.8%
53	35.5%	34.6%	35.0%	34.1%
54		6.7%	6.2%	
55	37.3%	38.6%	38.2%	
56			32.5%	30.5%
57	59.4%	39.2%	42.8%	46.4%
58	47.8%	46.5%	49.7%	
61	15.5%		43.7%	39.5%
62	57.6%		51.6%	38.5%
63	42.6%	42.9%	16.9%	35.7%
66			43.9%	
67	36.2%	35.4%		38.7%
71	35.7%	35.3%	36.3%	
74	31.3%			
76	50.1%	51.6%		45.5%
77			60.8%	56.5%
79		37.5%	39.4%	42.8%
91	48.2%	43.7%	44.6%	
97		42.1%	48.4%	36.3%
101	60.8%		49.7%	46.2%
431		47.7%	41.2%	
1728	39.9%		46.2%	37.5%

FOOD SERVICES
Labor Costs per Revenue



District	2015-2016	2016-2017	2017-2018	2018-2019
2	13.5%	32.0%		
3	38.6%	37.5%	37.4%	40.9%
4	30.1%	30.8%	34.2%	31.8%
5		46.5%	44.6%	
7	51.7%	49.0%	47.8%	49.4%
8	35.6%	37.1%	45.8%	45.4%
9	28.2%	30.3%	30.3%	30.2%
10	43.0%	45.1%	45.1%	
11				48.2%
12	42.5%	44.2%	47.4%	47.3%
13	37.4%	38.5%	39.7%	41.1%
14	37.5%	31.1%	40.4%	47.1%
16	49.1%	56.6%	51.3%	50.0%
18	33.0%	38.4%	34.0%	37.2%
19	32.5%	33.4%		
20	40.3%	38.3%	45.3%	45.0%
23	36.8%	38.9%	42.6%	
25			39.1%	47.3%
26			37.8%	
27			34.1%	33.1%
28	10.0%	14.2%	45.3%	37.6%
29		0.6%		
30	33.7%	28.8%	31.3%	36.0%
32	39.0%	40.4%	41.1%	46.6%
33		41.2%		
34	23.1%			
35	42.2%	38.7%	39.9%	43.8%
37		48.9%	47.5%	
39	39.1%	39.9%	40.2%	33.8%
41	38.9%	39.6%	40.1%	
43	41.1%	46.5%	46.7%	49.6%
44	4.2%	3.5%	3.5%	3.2%
45	33.6%	34.8%		
46	42.3%	43.4%	51.7%	
47	45.9%	40.8%	48.1%	50.3%
48	35.4%	37.7%	38.3%	
49	40.7%	36.4%	42.6%	43.6%
50		27.8%	30.2%	32.3%
51	43.6%	39.3%	58.9%	49.7%
52	36.8%		41.8%	47.6%
53	38.0%	42.6%	40.7%	43.9%
54	43.9%	46.9%	51.1%	
55	37.4%	38.2%	41.6%	
56			61.1%	60.0%
57	46.2%	48.0%		47.5%
58	33.1%	34.9%	40.1%	
61	16.5%		49.7%	54.9%
62	46.0%		45.2%	43.4%
63	38.6%	43.1%	19.6%	43.7%
66			35.2%	
67	37.6%	34.7%		44.9%
71	54.1%	53.2%	56.2%	
74	43.2%			
76	32.2%	35.7%		33.8%
77			50.2%	54.0%
79		51.9%	49.2%	52.2%
91	42.1%	45.4%	44.6%	
97		43.2%	49.8%	43.1%
101	60.3%		41.3%	42.8%
431		43.8%	37.5%	
1728	46.3%	66.7%	58.8%	51.9%

Description of Calculation

Total labor costs divided by total revenue.

Importance of Measure

Labor contributes the largest expense that food service revenue must cover.

School boards can control labor costs by establishing salary schedules and benefit plans, and directors can control labor cost by implementing productivity standards and staffing formulas.

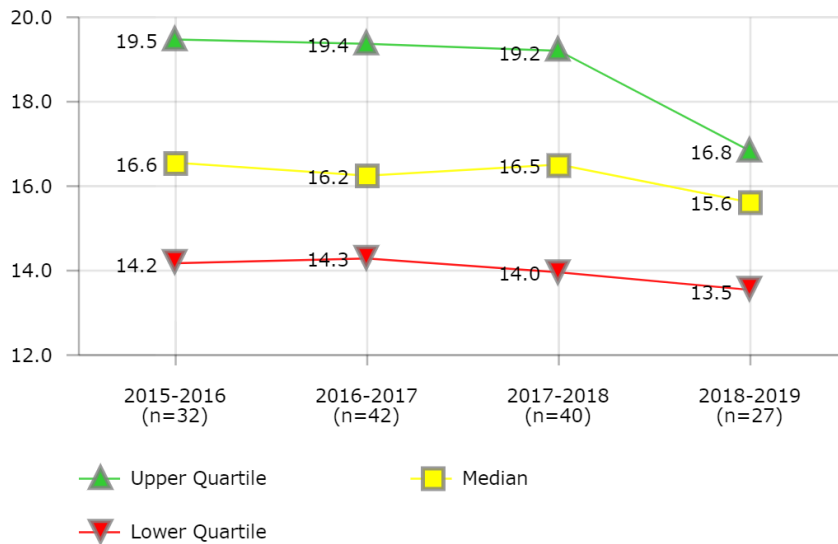
Factors that Influence

- Salary schedules and health and retirement benefits
- Number of annual work days and annual paid holidays
- Staffing formulas and productivity standards
- Union contracts
- Type of menu items

Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Clark County School District
- Detroit Public Schools
- Duval County Public Schools
- Houston Independent School District
- Milwaukee Public Schools
- Norfolk School District
- San Antonio Independent School District
- Shelby County Schools
- Wichita Unified School District

FOOD SERVICES
Meals Per Labor Hour



Description of Calculation

Annual number of breakfasts (less contractor-served breakfasts) *divided* by two *plus* annual number of lunches (less contractor-served lunches) *plus* annual number of snacks (less contractor-served lunches) *divided* by the total annual labor hours of all food preparation and cafeteria staff.

Importance of Measure

Efficiency is important in making the best use of available food service funds.

Factors that Influence

- Menu offerings
- Provision II and III
- Free/Reduced percentage
- Food preparation methods
- Local nutrition standards for al la carte foods

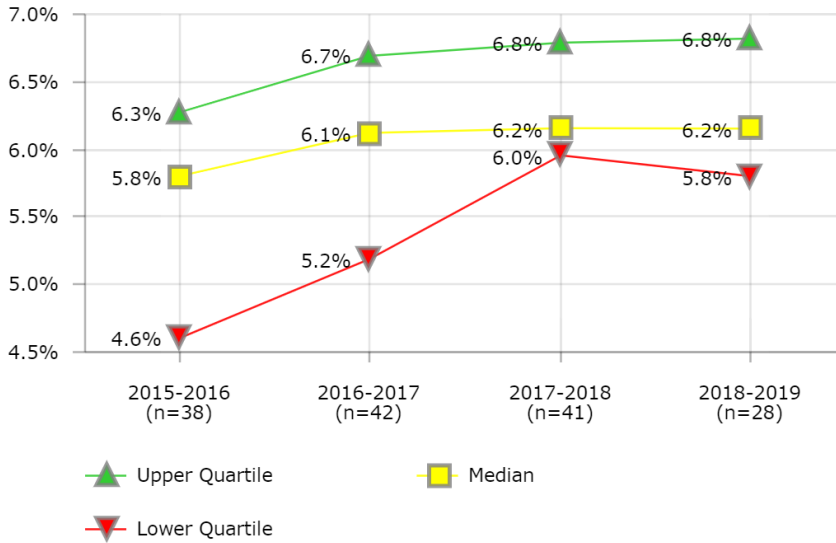
Districts in Best Quartile (2018-2019)

- Cincinnati Public Schools
- Clark County School District
- Columbus Public Schools
- Miami-Dade County Public Schools
- Palm Beach County School District
- Pittsburgh Public Schools
- St. Paul Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
2	13.1	16.7	15.8	
3	17.9	19.4	18.8	17.6
4	15.4	16.6	17.6	15.7
5		23.0	21.8	
7	12.3	14.2	12.8	12.9
8	18.2	17.3	17.1	16.8
9	21.7	22.3	20.4	20.4
10	11.4	10.9	11.6	
12	15.2	14.6	11.8	13.7
13	17.3	15.7	17.6	16.7
14	13.3	15.6	15.8	16.7
16	16.5	18.1	17.1	
18	16.6	18.0	16.6	13.2
19	20.7	14.2		
20	19.2	22.0	22.1	20.5
25				14.8
26			19.7	
27			15.0	16.1
30	15.5	15.5	15.3	14.5
32	16.6	27.6	24.4	25.8
33		23.1		
35	24.8	23.1	20.8	22.1
37		8.6	12.7	
39	14.0	15.5	12.1	13.2
41	17.4	16.8	16.5	
43	32.8	33.1	30.1	18.7
45	15.7	14.3		
46	14.3	15.3	16.0	
47	15.5	15.7	12.9	13.5
48	20.9	23.6	16.4	
49	12.2	12.3		12.4
50		16.9	19.6	15.9
51		7.5	24.4	12.0
52	5.3		16.6	16.5
53	16.6	16.2	15.4	15.6
55	15.0	14.6	13.5	
57		16.3	17.7	14.0
58	22.2	18.1	18.1	
62			25.1	
66		3.7	14.3	
67	23.7	25.5		
71	10.4	11.6	11.3	
76	19.7	19.9		14.4
79		13.1	13.6	12.0
91		15.8	14.7	
97		11.1	13.2	14.1
431		17.2	17.1	

FOOD SERVICES

USDA Commodities - Percent of Total Revenue



District	2015-2016	2016-2017	2017-2018	2018-2019
2	3.9%	2.6%		
3	5.5%	5.7%	5.9%	6.3%
5		6.9%	6.5%	
7	4.6%	4.5%	4.1%	4.5%
8	5.8%	6.2%	5.1%	5.5%
9	6.5%	6.9%	7.1%	8.1%
10	5.7%	6.0%	6.1%	
12	5.8%	5.8%	6.2%	6.4%
13	7.2%	8.8%	7.2%	6.9%
14	6.1%	7.5%	7.0%	7.2%
16	6.1%	5.5%		
18	2.9%	4.9%	8.3%	6.0%
19	0.0%			
20	5.6%	6.3%	6.0%	6.2%
25			7.0%	6.8%
26		3.1%	5.3%	
27			5.1%	5.4%
28	6.0%	6.9%	7.0%	7.0%
29		4.0%		
30	5.4%	6.1%	6.3%	5.8%
32	6.4%	6.7%	6.0%	6.1%
33		6.2%		
34	2.3%			
35	5.9%	5.8%	6.5%	6.6%
37		6.4%	6.0%	
39			5.5%	5.3%
41	6.3%	6.2%	6.2%	
43	5.7%	3.2%	6.2%	4.1%
44	6.1%	5.9%	6.0%	6.0%
45	5.9%	5.2%		
46	4.6%	6.5%	5.8%	
47	3.5%		6.3%	7.2%
48	6.0%	6.2%	6.0%	
49	5.2%	5.6%	6.0%	5.8%
50		5.7%	5.6%	3.4%
51	3.4%	6.7%	8.0%	6.1%
52	6.0%		6.1%	6.0%
53	5.5%	5.2%	6.0%	5.9%
54	6.3%	6.7%	6.2%	
55	6.3%	6.5%	6.6%	
57	6.3%	6.9%		6.9%
58	5.2%	5.9%	5.4%	
62			7.0%	
63		4.4%		
66			6.8%	
67	7.0%	6.8%		
71	2.4%	2.2%	4.1%	
74	6.5%			
76	4.6%	4.7%		6.3%
79		6.7%	6.6%	8.3%
91	6.6%	6.7%	7.3%	
97		6.5%	7.9%	6.6%
431			6.4%	

Description of Calculation

Total value of commodities received divided by total revenue.

Importance of Measure

Maximizing the use of USDA Commodities is a common strategy to minimize direct costs

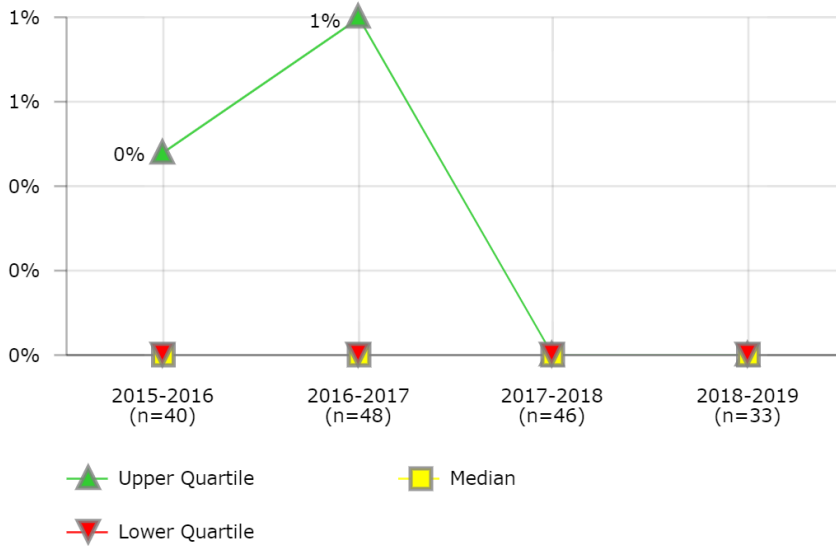
Factors that Influence

- Flexibility of meal planning
- Use of USDA bonuses
- Maximization of reimbursements

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Atlanta Public Schools
- Broward County Public Schools
- Clark County School District
- Cleveland Metropolitan School District
- Metropolitan Nashville Public Schools
- Toledo Public Schools

FOOD SERVICES
Provision II Enrollment Rate - Breakfasts



Description of Calculation

Number of students enrolled in Provision II breakfast program divided by total number of students with access to breakfast meals.

Importance of Measure

This Provision reduces application burdens and simplifies meal counting and claiming procedures. It allows schools to establish claiming percentages and to serve all meals at no charge for a four-year period.

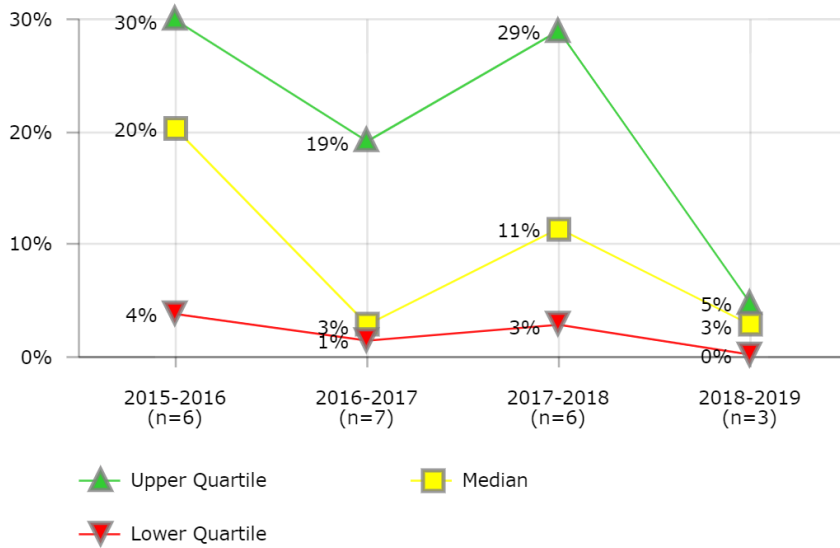
Factors that Influence

- History of schools serving meals to all participating children at no charge for 4 years
- Stability of income of school's population
- Increased participation to offset increased costs and loss of full pay and reduced-price meal charges.

District	2015-2016	2016-2017	2017-2018	2018-2019
1		0%		0%
2	0%	0%	0%	
3	42%	42%	43%	43%
4	0%	0%	0%	0%
5		13%	30%	
7	0%	0%	0%	0%
8	0%	1%	0%	0%
9	21%	1%	8%	8%
10	0%	0%	0%	
12	0%	0%	0%	0%
13	0%	0%	0%	0%
14	4%	3%	3%	3%
16	44%	42%	50%	
18	0%	0%	0%	0%
19	0%	0%		
20	21%	100%	20%	22%
23	0%	0%	0%	
25			0%	0%
26		0%	0%	
27			0%	0%
28	0%	0%	0%	0%
29		3%		
30	0%	0%	0%	0%
32	0%	0%	0%	0%
33		0%		
34	0%			
35	0%	0%	0%	0%
37		0%	0%	
39	0%	0%	0%	0%
41	0%	0%	0%	
43	0%	0%	0%	0%
44	0%	0%	0%	0%
46	0%	0%	0%	
47	0%	0%	0%	0%
48	30%	19%	0%	
49	0%	0%	0%	0%
50				0%
51	31%	34%	0%	0%
52	0%		29%	48%
53	0%	0%	0%	0%
54		0%	0%	
55	0%	0%	0%	
57		0%	0%	0%
58	0%	0%	0%	
62			29%	
63	0%	0%	0%	0%
66	100%	100%	100%	0%
67	1%	1%		0%
71	0%	0%	0%	
74	0%			
76	0%	0%		0%
79		0%	0%	0%
91	24%	23%	27%	
97		0%	0%	0%
431		0%	0%	

FOOD SERVICES

Provision II Enrollment Rate - Lunches



District	2015-2016	2016-2017	2017-2018	2018-2019
8		0%	0%	0%
9	21%	1%	5%	5%
14	4%	3%	3%	3%
16	43%	41%	49%	
29		3%		
48	30%	19%		
62			29%	
67	1%			
91	19%	19%	18%	

Description of Calculation

Number of students enrolled in Provision II lunch program divided by total number of students with access to lunch meals.

Importance of Measure

This Provision reduces application burdens and simplifies meal counting and claiming procedures. It allows schools to establish claiming percentages and to serve all meals at no charge for a four-year period.

Factors that Influence

- History of schools serving meals to all participating children at no charge for 4 years
- Stability of income of school's population
- Increased participation to offset increased costs and loss of full pay and reduced-price meal charges.

Maintenance & Operations

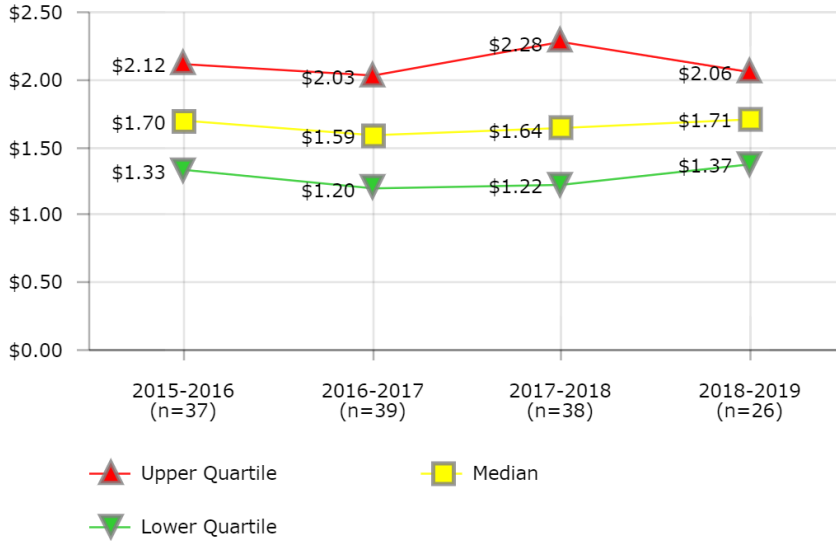
Performance metrics in maintenance and operations (M&O) assess the cost efficiency and service levels of a district's facilities management and labor. Areas of focus include *custodial work, maintenance work, renovations, construction, utility usage, and environmental stewardship*. The cost efficiency of custodial work is represented broadly by **Custodial Workload** and **Custodial Cost per Square Foot**, where low workload combined with high cost per square feet would indicate that cost savings can be realized by reducing the number of custodians. Additionally, the relative cost of supplies can be considered by looking at **Custodial Supply Cost per Square Foot**.

The relative cost of utilities is represented by **Utility Usage per Square Foot** and **Water Usage per Square Foot**.

These KPIs should give district leaders a general sense of where they are doing well and where they can improve. The importance and usefulness of each KPI is described in the "Importance of Measure" and "Factors that Influence" headings, which can be used to guide improvement strategies.

MAINTENANCE & OPERATIONS

Custodial Work - Cost per Square Foot



Description of Calculation

Total cost of district-operated custodial work plus total cost of contract-operated custodial work, divided by total square footage of all non-vacant buildings.

Importance of Measure

This measure is an important indicator of the efficiency of the custodial operations. The value is impacted not only by operational effectiveness, but also by labor costs, material and supply costs, supervisory overhead costs as well as other factors. This indicator can be used as an important comparison with other districts to identify opportunities for improvement in custodial operations to reduce costs.

Factors that Influence

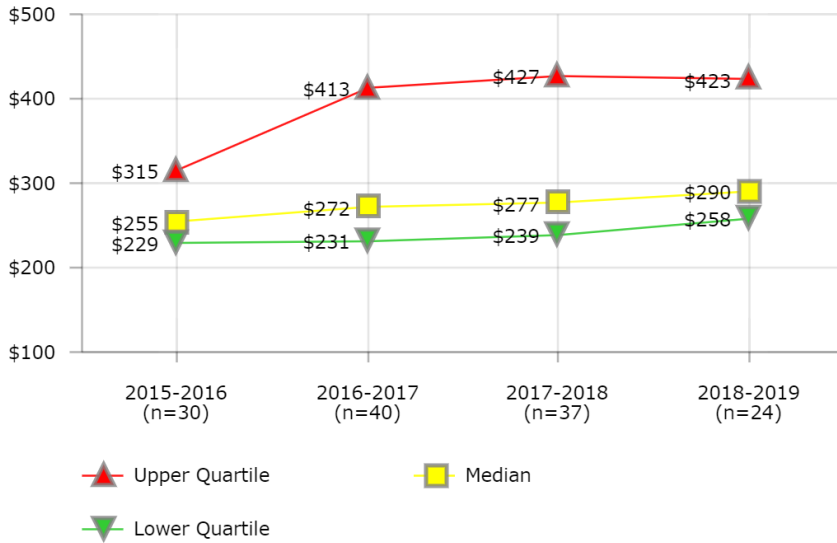
- Cost of labor
- Collective bargaining agreements
- Cost of supplies and materials
- Size of school

Districts in Best Quartile (2018-2019)

- Des Moines Public Schools
- Guilford County School District
- Jefferson County Public Schools (KY)
- Palm Beach County School District
- San Antonio Independent School District
- Toledo Public Schools
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1				\$1.82
3	\$2.42	\$2.20	\$2.11	\$2.31
4	\$1.84	\$1.59	\$1.69	\$1.31
5		\$1.73	\$1.58	
7	\$1.78	\$2.03	\$1.98	\$1.84
8	\$1.18	\$1.17	\$1.20	\$1.26
9	\$2.07	\$2.25	\$2.28	\$2.32
10	\$1.81	\$1.91	\$1.96	\$1.96
12	\$2.75	\$2.78	\$3.09	\$0.53
13	\$1.58	\$1.65	\$1.70	\$1.67
14	\$1.17	\$1.16	\$1.16	\$5.94
16	\$1.89		\$3.83	
18	\$1.47	\$1.20	\$3.19	\$1.96
19		\$3.97		
20	\$1.87	\$1.84	\$1.83	\$1.86
23			\$1.27	
25			\$1.73	\$1.66
26		\$0.53		
28	\$1.29	\$1.31	\$1.11	\$1.65
29		\$1.53		
30	\$1.34	\$1.48	\$1.52	\$1.75
34	\$1.70			
35	\$5.30			\$2.56
37	\$1.63	\$1.66		
39	\$1.32	\$1.66	\$1.30	
41	\$1.27	\$1.18	\$1.14	
43	\$3.43	\$3.51	\$3.80	
44	\$1.93	\$1.93	\$2.01	\$2.06
47	\$2.12	\$1.28	\$1.44	\$1.51
48	\$1.67	\$1.59	\$1.54	\$1.59
49	\$1.33	\$1.47	\$1.53	\$1.37
50		\$0.59	\$0.27	\$1.67
51	\$1.24	\$1.23	\$1.22	
52	\$2.15			\$2.20
53			\$0.43	\$0.44
54	\$1.53	\$0.58	\$0.57	
55	\$1.47	\$1.58	\$1.60	
57	\$1.02	\$1.02	\$1.11	
58	\$2.70			
63	\$2.30	\$1.55	\$1.50	
66	\$2.15	\$2.10	\$1.99	
67	\$0.88	\$3.87	\$4.16	
71	\$1.49	\$2.12	\$2.40	
74	\$2.28	\$2.31		
76	\$0.53	\$0.62		\$0.64
79		\$1.92	\$3.61	\$1.22
91	\$2.05	\$2.02	\$2.28	
97		\$1.09	\$2.49	\$2.49
431			\$0.16	

MAINTENANCE & OPERATIONS
Custodial Work - Cost per Student



District	2015-2016	2016-2017	2017-2018	2018-2019
3	\$472	\$438	\$431	\$484
4	\$279	\$296	\$326	\$267
5			\$320	
7	\$294	\$331	\$329	\$305
8	\$184	\$181	\$182	\$192
9	\$229	\$240	\$254	\$261
10	\$251	\$266	\$277	
12	\$487	\$528	\$589	\$95
13	\$258	\$278	\$278	\$275
14	\$224	\$229	\$230	\$255
16	\$217		\$538	
18	\$237	\$232	\$517	\$332
19		\$848		
20	\$353	\$343	\$327	\$342
23			\$233	
25		\$466	\$384	\$361
26		\$109		
27				\$612
28	\$283	\$292	\$277	\$410
29		\$414		
30	\$315	\$295	\$302	\$355
34	\$502			
35		\$566	\$462	\$466
37	\$243	\$282		
39	\$193	\$231	\$263	
41	\$211	\$201	\$193	
43		\$917	\$1,065	
44	\$259	\$254	\$262	\$267
47		\$209	\$251	
48	\$248	\$231	\$229	\$235
49	\$251	\$262	\$277	
50		\$256	\$70	\$437
51	\$223	\$226	\$236	\$262
53		\$719	\$69	\$72
54	\$263	\$92		
55	\$218	\$238	\$239	
57	\$277	\$243	\$268	
58	\$511			
63	\$702	\$477	\$479	
66		\$444		
67		\$412	\$427	\$461
71	\$250	\$354	\$410	
74	\$387			
76		\$123		\$136
79		\$404	\$751	\$263
91	\$238	\$235	\$266	
97		\$189	\$454	\$462
431			\$26	

Description of Calculation

Total custodial work costs (contractor and district operated), divided by total student enrollment.

Importance of Measure

This measure is an important indicator of the efficiency of the custodial operations. The value is impacted not only by operational effectiveness, but also by labor costs, material and supply costs, supervisory overhead costs as well as other factors. This indicator can be used as an important comparison with other districts to identify opportunities for improvement in custodial operations to reduce costs.

Factors that Influence

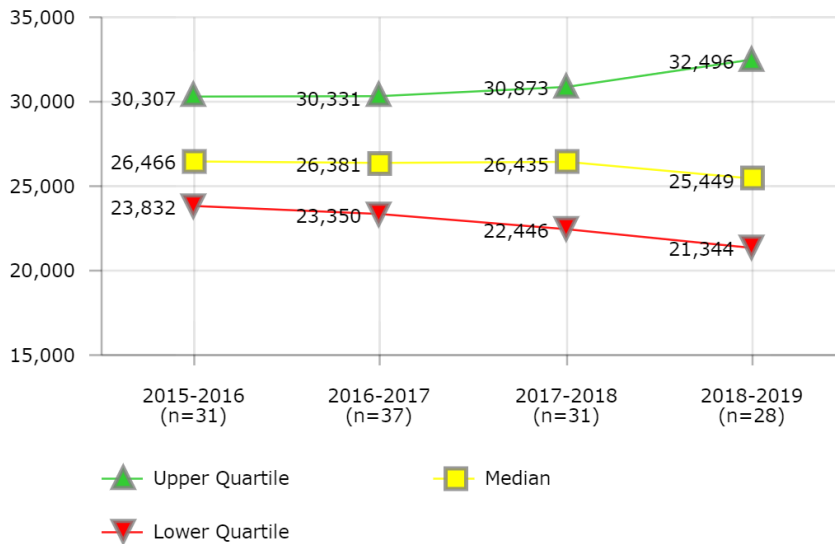
- Cost of labor
- Cost of supplies and materials
- Scope of duties assigned to custodians

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Des Moines Public Schools
- Jefferson County Public Schools (KY)
- Orange County Public School District
- Palm Beach County School District
- San Antonio Independent School District

MAINTENANCE & OPERATIONS

Custodial Workload



Description of Calculation

Total square footage of non-vacant buildings that are managed by the district, divided by total number of district custodial field staff. This measure only applies to district-operated sites.

Importance of Measure

This measurement is a very good indicator of the workload for each custodian. It allows districts to compare their operations with others to evaluate the relative efficiency of the custodial employees. A value on the low side could indicate that custodians may have additional assigned duties, or have opportunities for efficiencies compared to districts with a higher ratio. A higher number could indicate a well managed custodial program or that some housekeeping operations are assigned to other employee classifications. It is important for a district to examine what drives the ratio to determine the most effective workload.

Factors that Influence

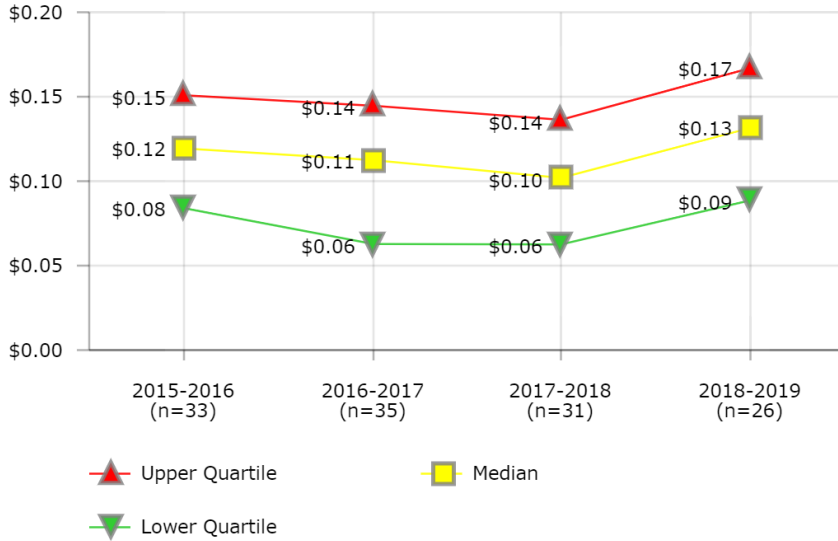
- Assigned duties for custodians
- Management effectiveness
- Labor agreements
- District budget

Districts in Best Quartile (2018-2019)

- Anchorage School District
- Cleveland Metropolitan School District
- Minneapolis Public Schools
- Oklahoma City Public Schools
- St. Paul Public Schools
- Toledo Public Schools
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1				24,703
3	31,110	31,448	33,851	33,553
4	27,451	32,635	33,547	32,835
5		26,213	24,957	
7	30,331	30,331	32,848	38,637
8	23,832	23,590	23,471	23,697
9		23,350	25,582	25,218
10	17,916	16,994		18,440
12	24,405	23,147	22,446	25,680
13	27,627	26,691	26,277	27,614
14	26,466	26,381	26,435	25,993
16	25,667	25,335	25,426	
19		26,434		
20	30,307	30,845	30,552	30,862
25			30,196	29,945
26		29,852		
27				18,923
28	49,780			
29		28,258		
30	33,528	30,984	31,688	32,157
34	22,944			
35	24,454	24,182	24,783	22,609
37	26,257	24,822		
39	19,626	18,838	18,702	
41	29,298	29,794	31,681	
43	24,348	24,348	26,822	
44	20,721	19,010	18,673	19,010
48	27,225	31,092	29,418	27,953
49	24,751	24,830	22,515	24,279
50				21,150
51	42,865	42,865		42,865
52	28,297			33,116
53		21,695	22,309	22,466
55	29,972	29,313	28,931	
57	44,838	44,838	47,569	47,806
58	21,927			
63	32,718	32,375	32,375	
66	26,418	27,037	28,291	
67		24,112	16,724	16,724
71	20,584	19,876	20,292	
76	17,293	17,293		19,244
79		33,823	30,873	40,228
91	28,676	29,923	27,524	
97		22,877	17,834	20,905
431		21,538	21,538	21,538

MAINTENANCE & OPERATIONS
Custodial Supply Cost per Square Foot



District	2015-2016	2016-2017	2017-2018	2018-2019
1				\$0.31
3	\$0.14	\$0.14	\$0.13	\$0.15
4	\$0.16	\$0.12	\$0.17	\$0.16
5		\$0.17	\$0.16	
7	\$0.08	\$0.07	\$0.10	\$0.09
8	\$0.07	\$0.06	\$0.07	\$0.07
9	\$10.35	\$0.01	\$0.18	\$0.18
10	\$0.12	\$0.11	\$0.12	\$0.10
12	\$0.12	\$0.12	\$0.06	\$0.11
13	\$0.05	\$0.09	\$0.08	\$0.08
14	\$0.04	\$0.04	\$0.05	\$0.05
16	\$0.10		\$0.10	
19		\$0.24		
20	\$0.25	\$0.23		\$0.23
25			\$0.10	\$0.09
26		\$0.11		
27				\$0.16
28	\$0.09			
30	\$0.03	\$0.04	\$0.04	\$0.04
32	\$0.05	\$0.04		
34	\$0.17			
35	\$0.19	\$0.14	\$0.17	\$0.16
37	\$0.12	\$0.13		
39	\$0.10	\$0.15	\$0.13	
41	\$0.09	\$0.06	\$0.06	
43	\$0.12	\$0.11	\$0.11	
46		\$0.01		
48	\$0.15	\$0.11	\$0.14	\$0.13
49	\$0.01	\$0.04	\$0.06	\$0.06
50				\$0.26
51	\$0.24	\$0.16	\$0.05	\$0.13
52	\$0.16			\$0.25
53			\$0.15	\$0.21
55	\$0.11	\$0.08	\$0.10	
57	\$0.11	\$0.11	\$0.11	
58	\$0.16			
63	\$0.05	\$0.20	\$0.17	
66	\$0.11	\$0.10	\$0.10	
67	\$0.13	\$0.12	\$0.12	\$0.13
71	\$0.13	\$0.18	\$0.16	
76	\$0.12	\$0.17		\$0.17
79		\$0.03	\$0.05	\$0.14
91	\$0.07	\$0.08	\$0.08	
97		\$0.05	\$0.06	\$0.05
431		\$0.12	\$0.12	\$0.12

Description of Calculation

Total custodial supply cost of district-operated custodial services, divided by total square footage of buildings managed by the district. This measure only applies to district-operated sites.

Importance of Measure

This measure is an important indicator of the efficiency of the custodial operations. The value is impacted not only by operational effectiveness, but also by labor costs, material and supply costs, supervisory overhead costs as well as other factors. This indicator can be used as an important comparison with other districts to identify opportunities for improvement in custodial operations to reduce costs.

Factors that Influence

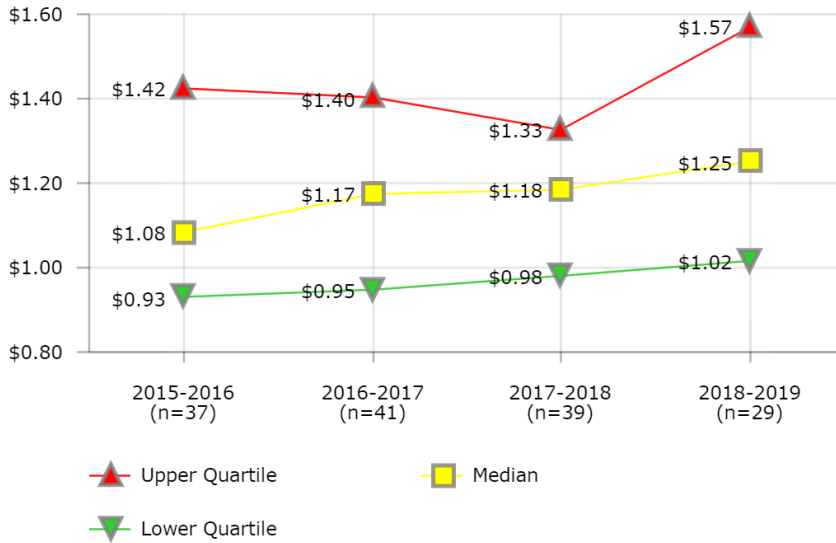
- Cost of labor
- Cost of supplies and materials
- Scope of duties assigned to custodians

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Anchorage School District
- Broward County Public Schools
- Guilford County School District
- Milwaukee Public Schools
- Palm Beach County School District
- Pinellas County Schools

MAINTENANCE & OPERATIONS

Routine Maintenance - Cost per Square Foot



Description of Calculation

Cost of district-operated maintenance work plus cost of contractor-operated maintenance work, divided by total square footage of non-vacant buildings.

Importance of Measure

This provides a measure of the total costs of routine maintenance relative to the district size (by building square footage).

Factors that Influence

- Age of infrastructure
- Experience of maintenance staff
- Training of custodial staff to do maintenance work
- Deferred maintenance backlog

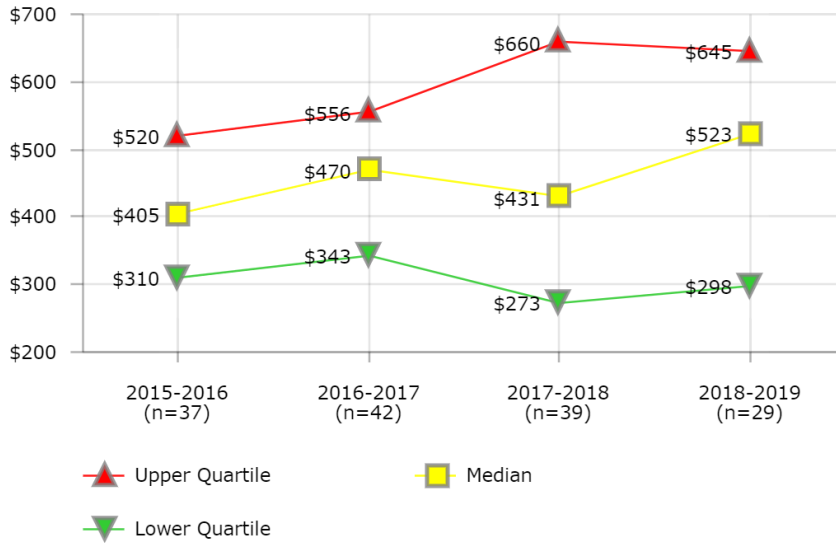
Districts in Best Quartile (2018-2019)

- El Paso Independent School District
- Guilford County School District
- Jefferson County Public Schools (KY)
- Orange County Public School District
- San Antonio Independent School District
- Seattle School District 1
- St. Paul Public Schools
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1				\$0.62
3	\$1.06	\$0.90	\$0.87	\$0.68
4	\$1.65	\$1.17	\$1.21	\$1.02
5		\$1.02	\$1.08	
7	\$1.28	\$1.47	\$1.42	\$1.67
8	\$0.96	\$1.08	\$1.32	\$1.62
9	\$1.27	\$1.39	\$1.24	\$1.31
10	\$0.96	\$0.96	\$1.08	\$1.30
12	\$0.59	\$1.20	\$1.14	\$1.49
13	\$1.05	\$0.95	\$0.93	\$1.09
14	\$1.24	\$1.23	\$1.21	
16	\$1.35	\$1.33	\$1.37	
18	\$1.45	\$1.39	\$1.21	\$1.57
20	\$1.37	\$1.43	\$1.46	\$1.57
23			\$1.18	
25			\$1.21	\$1.23
27				\$1.33
28	\$1.58	\$1.41	\$1.12	\$1.37
29		\$0.78		
30	\$0.93	\$1.21	\$1.10	\$1.11
32	\$0.83	\$1.63	\$1.08	\$1.25
34	\$1.25			
35				\$1.57
37	\$0.81	\$0.93		
39	\$1.72	\$1.62	\$0.84	
41	\$1.08	\$1.06	\$0.99	
43	\$1.61	\$1.80	\$1.69	\$1.75
44	\$1.67	\$1.79	\$1.72	\$1.74
46	\$1.08	\$0.79	\$0.98	
47	\$1.42	\$1.46	\$1.33	\$1.18
48	\$0.80	\$0.83	\$0.78	\$0.90
49	\$0.66	\$0.86	\$0.67	\$0.57
50		\$0.60	\$1.94	\$1.96
51	\$1.03	\$1.15	\$1.37	
52	\$1.76			\$3.69
53		\$0.61	\$0.64	\$0.95
54	\$1.20	\$1.43	\$0.62	
55	\$1.51	\$1.18	\$1.21	
57	\$0.63	\$1.25	\$1.29	\$1.15
58	\$0.93			
63	\$0.91	\$1.22	\$1.40	
66	\$1.06	\$1.10	\$1.01	
67		\$2.70	\$2.98	
71	\$1.50	\$1.07	\$1.19	
74	\$1.39	\$1.40		
76	\$1.01	\$1.05		\$1.00
91	\$0.82	\$0.83	\$0.85	
97		\$1.02	\$1.06	\$1.03
431		\$0.85	\$0.84	\$0.84

MAINTENANCE & OPERATIONS

Routine Maintenance - Cost per Work Order



District	2015-2016	2016-2017	2017-2018	2018-2019
1				\$179
3	\$576	\$484	\$535	
4	\$447	\$386	\$380	\$265
5		\$554	\$660	
7	\$390	\$465	\$431	\$524
8	\$255	\$302	\$339	\$435
9	\$597	\$766	\$533	\$539
10	\$231	\$225	\$248	\$298
12	\$295	\$530	\$577	\$446
13	\$551	\$525	\$421	\$623
14	\$239	\$244	\$257	\$299
16	\$378	\$257	\$183	
18	\$507	\$567	\$695	\$734
20	\$426	\$860	\$669	\$862
23			\$410	
25		\$1,210	\$1,194	\$737
27				\$46
28	\$567	\$487		\$566
29		\$556		
30	\$768	\$866	\$730	\$792
32	\$600	\$1,225	\$944	\$667
34	\$252			
35		\$517	\$764	\$529
37	\$517	\$494		
39	\$489	\$475	\$387	
41	\$407	\$351	\$311	
43	\$520	\$534	\$589	\$582
44	\$206	\$246	\$156	\$228
46	\$312	\$259	\$258	
47	\$430	\$452	\$434	\$363
48	\$326	\$343	\$273	\$358
49	\$310	\$356	\$262	\$250
50		\$650	\$1,842	\$1,227
51	\$123	\$249	\$515	\$360
52	\$778			\$1,579
53		\$193	\$220	\$645
54	\$242	\$2,388	\$217	
55	\$403	\$357	\$344	
57		\$3,236	\$3,339	
58	\$702			
63	\$385	\$629	\$685	
66	\$427	\$514	\$473	
67	\$405	\$417	\$393	\$523
71	\$243	\$182	\$239	
74	\$623			
76	\$369	\$373		\$240
91	\$347	\$447	\$451	
97		\$363	\$477	
431		\$310	\$300	\$297

Description of Calculation

Total costs of all routine maintenance work, divided by total number of routine maintenance work orders.

Importance of Measure

This provides a measure of the costs of each routine maintenance work order.

Factors that Influence

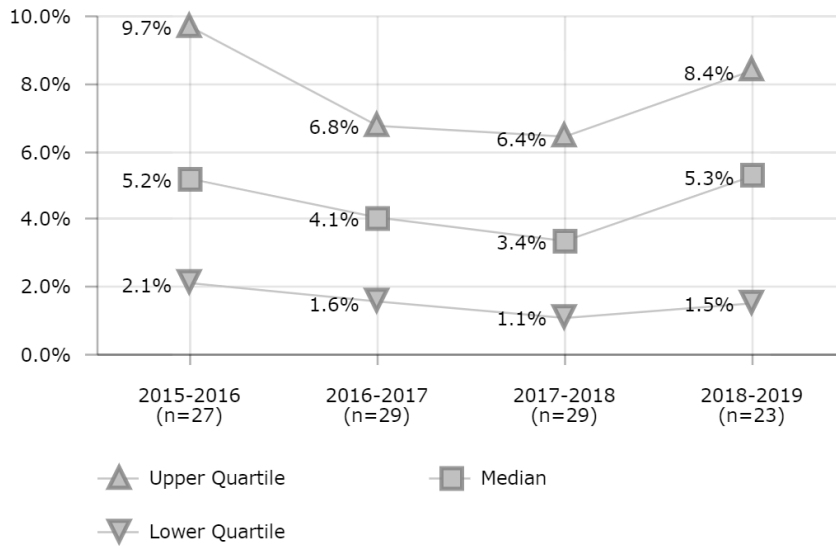
- Age of infrastructure
- Experience of maintenance staff
- Training of custodial staff to do maintenance work
- Deferred maintenance backlog

Districts in Best Quartile (2018-2019)

- Duval County Public Schools
- El Paso Independent School District
- Guilford County School District
- Hillsborough County Public Schools
- Norfolk School District
- San Antonio Independent School District
- Seattle School District 1
- Wichita Unified School District

MAINTENANCE & OPERATIONS

Routine Maintenance - Proportion Contractor-Operated, by Work Orders



Description of Calculation

Number of routine maintenance work orders handled by contractors, divided by total number of routine maintenance work orders.

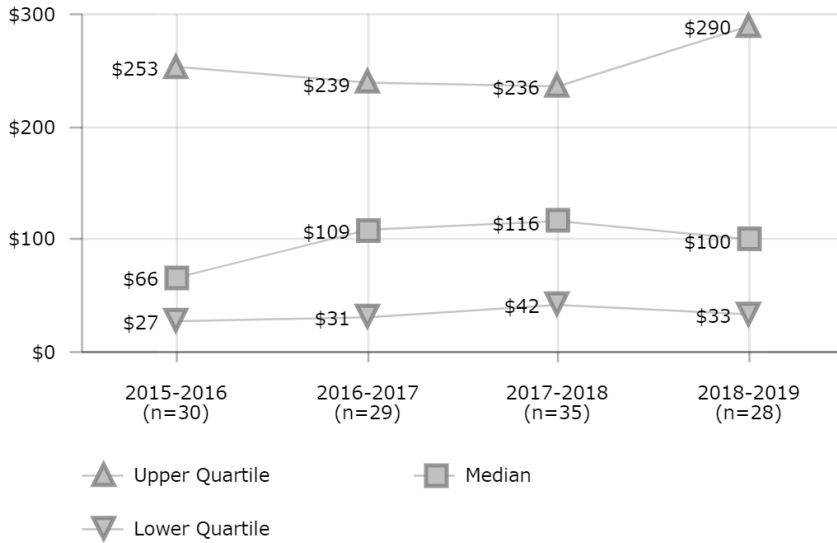
Importance of Measure

Can be used to identify districts that utilize contractors to perform routine maintenance.

District	2015-2016	2016-2017	2017-2018	2018-2019
1				1.4%
3	2.4%	2.5%	0.9%	
4	0.4%	0.3%	0.2%	0.1%
7			0.3%	0.5%
10	13.2%	12.6%	13.2%	13.9%
12	9.7%	6.2%	6.8%	10.4%
13	4.0%	3.7%	4.0%	1.9%
14	20.0%	23.9%		23.0%
16	2.0%	1.3%	1.4%	
18	1.2%	1.6%	1.1%	2.1%
20	6.4%	6.5%	4.7%	0.6%
23			1.6%	
25		4.2%	4.1%	6.0%
28	4.8%	6.0%		5.3%
30	6.2%	5.2%	2.7%	2.1%
32	5.2%	5.2%	3.4%	8.4%
34	0.8%			
35			12.8%	10.1%
39	20.0%	0.3%	0.7%	
41	3.3%	2.1%	0.7%	
43	7.9%	13.9%	11.4%	7.5%
44	9.6%	6.8%	4.5%	7.6%
46	11.4%	16.4%	13.3%	
47			2.1%	3.9%
48	11.3%	12.4%	13.9%	
49	6.1%	3.4%	6.4%	8.0%
50				98.9%
51	0.0%	3.4%	4.3%	1.5%
52	10.1%			5.9%
54	7.7%	1.2%		
57		44.9%		
63			0.8%	
66	4.8%	4.1%	5.0%	
67	0.2%	0.3%	3.0%	0.1%
71	2.5%	0.9%	0.2%	
76	2.1%	3.0%		2.4%
79		0.1%	1.8%	
97		8.0%	11.0%	

MAINTENANCE & OPERATIONS

Major Maintenance - Cost per Student



District	2015-2016	2016-2017	2017-2018	2018-2019
3	\$272	\$629	\$33	\$119
4	\$253	\$288	\$322	\$151
5			\$129	
7	\$253	\$235	\$662	\$88
8	\$45	\$69	\$116	\$468
9	\$12	\$24	\$42	\$19
10	\$86	\$88	\$70	
12	\$379	\$181	\$244	\$322
13	\$59	\$65	\$104	\$87
14	\$20	\$21	\$29	\$25
16	\$85		\$172	
18	\$45		\$8	\$21
19		\$552		
20			\$6	\$19
23			\$199	
27				\$140
28	\$20	\$20	\$236	\$258
30	\$271	\$205	\$162	\$53
32	\$26	\$35	\$3	\$41
34	\$28			
35				\$818
39	\$73	\$31	\$64	
41	\$612	\$664	\$1,200	
43	\$501	\$688	\$722	\$892
44	\$5	\$128	\$118	\$65
48	\$27	\$23	\$64	\$76
49	\$210	\$200	\$62	
50		\$70	\$156	
51			\$101	\$495
53		\$41	\$38	\$84
55	\$30	\$29	\$29	
56	\$30			
57	\$363	\$319	\$331	\$161
61				\$332
62				\$0
63		\$116	\$124	
66	\$15	\$22		
67	\$7		\$7	\$8
71	\$124	\$239	\$60	
74	\$60			
76		\$16		\$3
77	\$101		\$97	\$112
91	\$445	\$563	\$605	
97		\$109	\$149	\$178
1728			\$262	\$344

Description of Calculation

Total cost of major maintenance work divided by total student enrollment.

Importance of Measure

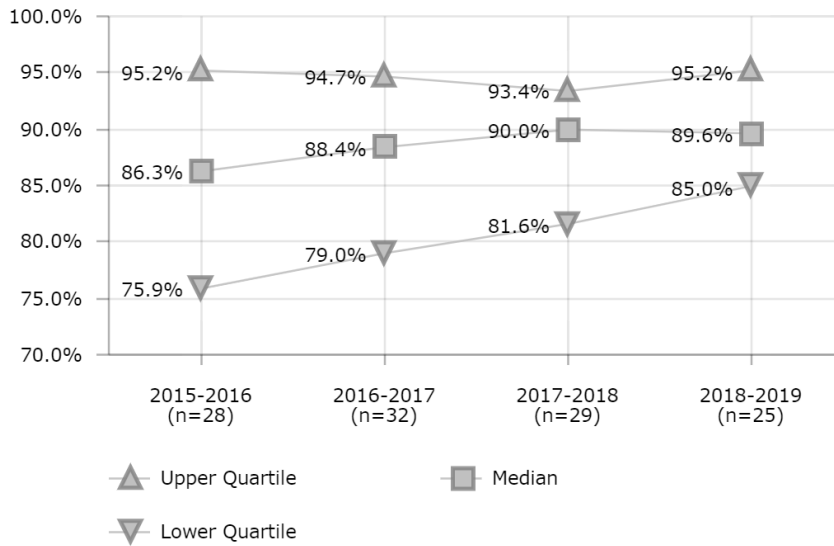
This looks at the cost of major maintenance projects relative to the size of the district (by student enrollment).

Factors that Influence

- Number of capital projects
- Deferred maintenance backlog
- Passage of bond measures
- Age of infrastructure
- District technology plan

MAINTENANCE & OPERATIONS

Major Maintenance - Delivered Construction Costs as Percent of Total Costs



Description of Calculation

Construction costs of major maintenance/minor renovation projects, divided by total costs of all major maintenance/minor renovation projects.

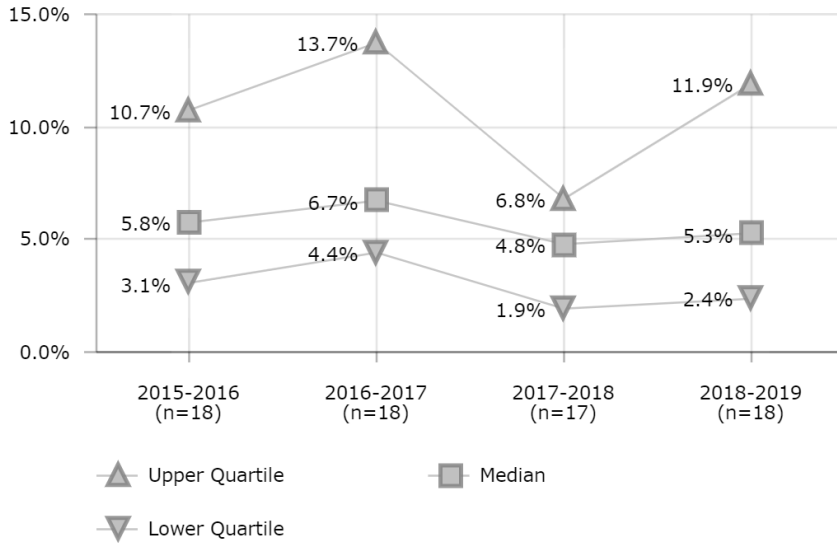
Importance of Measure

This can be used to evaluate the cost of delivered construction relative to design costs and personnel costs.

District	2015-2016	2016-2017	2017-2018	2018-2019
1				97.5%
3	94.9%	85.5%		88.3%
4	82.8%	88.7%	91.8%	88.4%
5		63.3%	48.8%	
7	75.2%	72.7%	81.4%	95.2%
8	76.5%	88.1%	87.5%	85.0%
9	98.7%	87.0%	68.0%	80.4%
10	93.0%	94.8%	96.8%	95.6%
12	100.0%	96.8%	95.4%	97.1%
13	92.5%	91.9%	92.9%	92.4%
14	41.1%	41.0%	49.0%	52.0%
16	93.3%	93.3%	96.0%	
18	18.6%			
19		64.5%		
20			87.8%	89.6%
23			81.6%	
27				98.5%
28	58.0%	59.1%	91.1%	88.6%
30	93.3%	91.6%	93.4%	76.4%
32	85.0%	83.9%		80.5%
34	75.0%			
35				94.0%
39	100.0%	100.0%	100.0%	
41	86.9%	81.0%	85.2%	
43	62.8%	79.4%	78.8%	78.3%
44	45.2%	82.8%	92.1%	86.3%
48	79.5%	80.7%	91.1%	92.6%
49	91.9%	94.6%	85.1%	91.2%
50		92.2%	94.2%	
51			87.6%	95.6%
52	83.8%			
53		89.7%	84.5%	84.4%
55	100.0%	100.0%	100.0%	
57	95.5%	95.5%	95.5%	89.6%
63		54.8%	54.8%	
66	79.3%	78.6%	79.5%	
71	85.6%	35.4%		
74	100.0%	100.0%		
76	100.0%	95.8%		100.0%
91		97.8%	90.0%	
97		90.1%	92.2%	93.2%

MAINTENANCE & OPERATIONS

Major Maintenance - Design to Construction Cost Ratio



District	2015-2016	2016-2017	2017-2018	2018-2019
3	1.9%	14.8%		5.3%
4	1.5%	5.8%	2.9%	2.4%
7	10.7%	13.7%	11.4%	
8	4.0%		6.8%	15.9%
9	1.4%	14.9%		0.9%
10	5.1%	4.1%	1.1%	3.1%
12		3.3%	4.8%	3.0%
13			0.2%	
14	0.2%	5.9%	1.1%	2.1%
16	6.0%	6.0%	3.5%	
18	141.6%			
27				1.5%
28	6.2%	6.1%	8.2%	11.9%
30	5.5%	7.4%	6.0%	24.5%
32	9.2%	10.0%		11.5%
35				5.5%
41	13.5%	21.2%	16.1%	
43		20.5%	21.3%	23.7%
44	46.3%	13.4%	1.9%	5.9%
49	4.9%	1.7%	4.9%	3.1%
50		8.5%	1.3%	
51				0.5%
52	11.1%			
53				15.4%
57	3.1%	3.1%	3.1%	5.2%
71	7.2%			
76		4.4%		
91			5.3%	

Description of Calculation

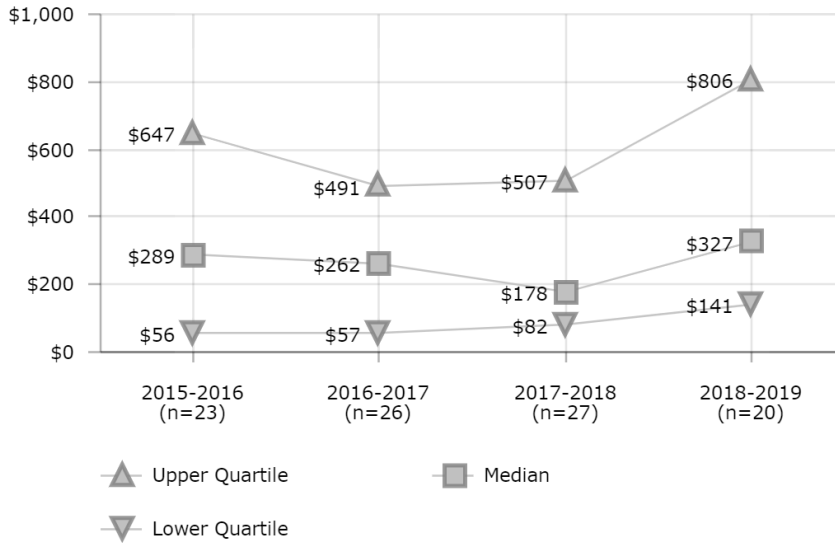
Design costs of all major maintenance/minor renovation projects, divided by construction costs of all major maintenance/minor renovation projects.

Importance of Measure

This can be used to evaluate the cost of delivered construction relative to design costs.

MAINTENANCE & OPERATIONS

Renovations - Cost per Student



Description of Calculation

Total cost of renovations divided by total student enrollment.

Importance of Measure

This indicates the level of spending on major renovations relative to the size of the district (by student enrollment).

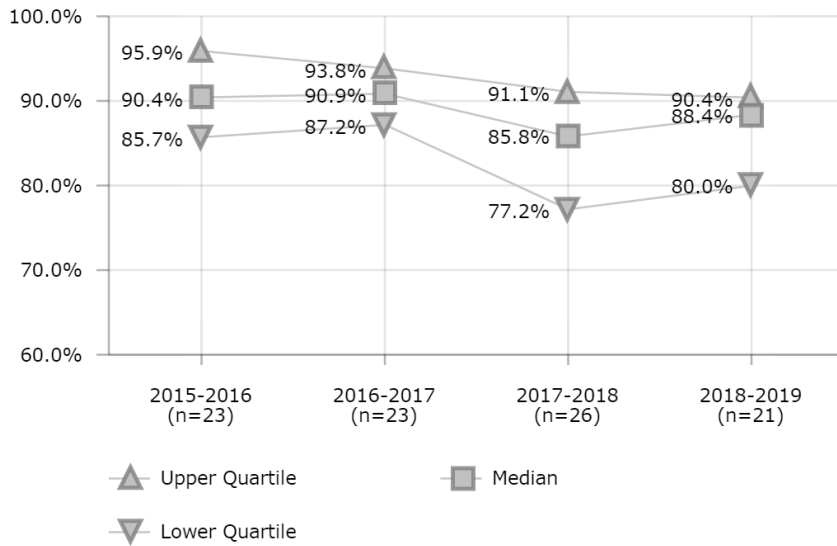
Factors that Influence

- Number of capital projects
- Age of infrastructure
- District technology plan

District	2015-2016	2016-2017	2017-2018	2018-2019
3	\$408	\$934		\$1,528
4	\$51	\$55	\$96	\$132
5			\$129	
7	\$514	\$245		\$301
8	\$5	\$4	\$5	\$7
9	\$27	\$230	\$254	\$147
10	\$137	\$84	\$113	
12	\$1,392	\$871	\$742	\$700
13		\$134	\$178	\$301
14	\$379	\$366	\$283	\$258
16	\$570		\$685	
18			\$471	\$897
20		\$278	\$82	\$352
23			\$386	
25		\$19	\$41	\$55
28	\$1,928	\$719	\$292	\$1,137
30	\$289	\$183	\$143	\$143
32			\$37	
34	\$56			
37	\$565			
39	\$1,720	\$4,786	\$2,089	
43	\$954	\$491	\$430	\$778
44	\$63			\$139
46	\$33	\$240	\$158	
48	\$688	\$427	\$692	\$383
49	\$164	\$322	\$134	
51				\$14
53		\$582	\$692	\$759
54		\$2	\$81	
55	\$70	\$57	\$13	
57		\$10	\$11	
63	\$170			
66	\$25	\$52		
71	\$647	\$884	\$649	
76		\$451		\$1,140
97		\$366	\$507	\$835

MAINTENANCE & OPERATIONS

Renovations - Delivered Construction Costs as Percent of Total Costs



District	2015-2016	2016-2017	2017-2018	2018-2019
1				48.5%
3	95.6%	61.3%	91.3%	91.3%
4	84.8%	89.0%	91.8%	88.6%
5		89.6%	48.8%	
7	85.6%	87.2%		73.9%
8		49.8%	60.3%	
9	85.7%	87.8%	77.5%	95.5%
10	90.0%	90.1%	85.6%	85.8%
12	95.9%	90.9%	87.7%	89.7%
13			56.5%	78.1%
14	98.7%	98.6%	98.6%	98.5%
16	87.8%		87.8%	
18			91.6%	89.4%
20		95.2%	89.7%	83.7%
23			81.8%	
25				49.0%
28	96.5%	93.1%		92.4%
30	94.8%	91.0%	80.4%	88.4%
32			94.3%	
34	75.0%			
37	89.0%			
39	98.5%	99.5%	99.3%	
43	95.9%	93.8%	86.0%	90.4%
44	87.3%			86.0%
46		93.7%	76.4%	
48	90.4%	93.8%	90.1%	89.1%
49	90.6%	96.0%	91.1%	80.0%
52	92.4%			93.4%
53		86.2%	88.8%	86.1%
55	90.1%	92.2%	77.2%	
62			79.7%	
63	96.6%			
66	80.7%	96.9%	75.2%	
71	76.7%	83.3%	81.9%	
76	93.1%	87.2%		65.2%
97		75.8%	70.1%	

Description of Calculation

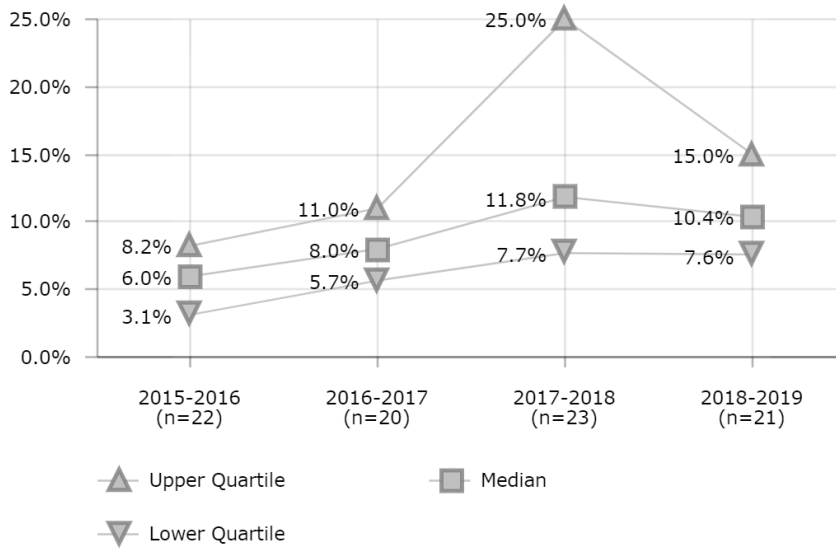
Construction costs of major rehab/renovation projects, divided by total costs of all major rehab/renovation projects.

Importance of Measure

This can be used to evaluate the cost of delivered construction relative to design costs and personnel costs.

MAINTENANCE & OPERATIONS

Renovations - Design to Construction Cost Ratio



Description of Calculation

Design costs of all major rehab/renovation projects, divided by construction costs of all major rehab/renovation projects.

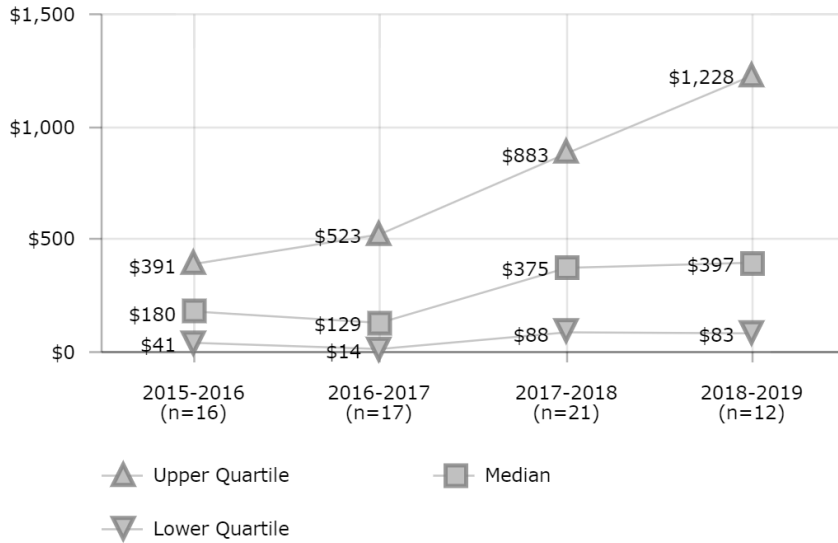
Importance of Measure

This can be used to evaluate the cost of delivered construction relative to design costs.

District	2015-2016	2016-2017	2017-2018	2018-2019
1				100.0%
3	3.8%	60.1%	8.9%	8.3%
4	1.5%	5.8%	2.9%	9.0%
5		10.0%	82.8%	
7	13.6%	8.1%		10.4%
8	7.0%			
9	1.0%	12.0%	25.0%	0.9%
10	6.2%	6.0%	11.8%	14.9%
12	3.1%	7.9%	11.5%	8.7%
13				23.9%
14	0.8%	0.9%	1.0%	0.9%
16	12.4%		12.4%	
18			8.5%	11.4%
20		2.8%	1.1%	18.4%
23			19.4%	
25				46.6%
28	3.4%	6.6%		7.6%
30	4.4%	8.1%	22.0%	11.2%
32			6.1%	
37	8.1%			
43	0.8%	0.2%	7.7%	6.5%
44	7.5%			11.1%
46	8.2%	6.7%	30.9%	
48	9.9%	5.5%	9.5%	8.6%
49	5.8%	2.8%	7.3%	6.3%
52	7.5%			5.3%
53		15.0%	10.6%	15.0%
55	11.0%	8.5%	29.5%	
62			20.0%	
63	0.2%			
66			33.0%	
71	25.5%	14.6%	16.5%	
76	5.6%	9.0%		48.2%
97		23.7%	39.1%	

MAINTENANCE & OPERATIONS

New Construction - Cost per Student



District	2015-2016	2016-2017	2017-2018	2018-2019
4	\$59	\$8		
5			\$125	
8	\$13	\$2	\$8	\$22
9	\$193	\$1,091	\$1,032	\$1,135
10	\$168	\$169	\$88	
13		\$17	\$14	\$24
14	\$1,210	\$1,182	\$1,524	\$1,532
16	\$502		\$604	
18	\$225		\$60	\$433
20				\$152
23			\$560	
27				\$1,812
28				\$448
30	\$5			
37	\$334			
39	\$61	\$129		
41	\$196	\$40	\$25	
44				\$34
46	\$22		\$95	
47		\$1,187	\$1,029	
48	\$560	\$2,682	\$883	
49	\$83	\$446	\$349	
50			\$188	
51		\$354	\$375	\$360
55	\$448	\$523	\$445	
57			\$6,819	
66		\$4		
71	\$8	\$12	\$45	
76		\$99		\$1,320
91			\$535	
97		\$14	\$1,097	\$132

Description of Calculation

Total costs of new construction projects, divided by total student enrollment

Importance of Measure

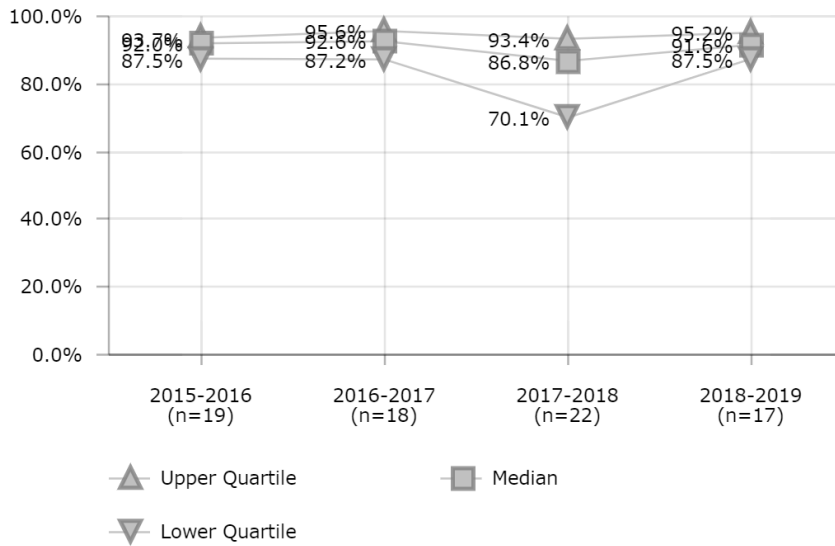
This looks at the total amount of construction spending relative to district size (by student enrollment).

Factors that Influence

- Number of capital projects
- Population growth trends
- Quality of buildings

MAINTENANCE & OPERATIONS

New Construction - Delivered Construction Costs as Percent of Total Costs



Description of Calculation

Delivered construction costs of new construction projects, divided by total costs of all new construction projects.

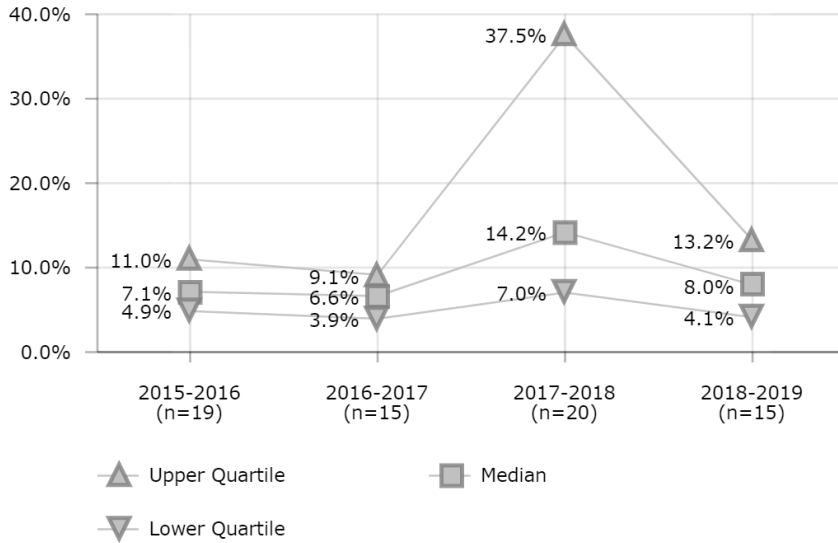
Importance of Measure

This can be used to evaluate the cost of delivered construction relative to design costs and personnel costs.

District	2015-2016	2016-2017	2017-2018	2018-2019
4	92.0%	76.8%		
5		91.9%	62.2%	
8	73.3%	23.6%	49.6%	40.5%
9	43.1%	91.4%	78.1%	91.6%
10	92.1%	94.7%	82.8%	87.9%
13		94.2%	70.1%	61.7%
14	98.7%	98.6%	92.2%	94.8%
16	87.5%		87.5%	
18	82.5%		90.8%	95.2%
20				87.5%
27				100.0%
28				97.7%
30	88.7%			
37	92.2%			
39	98.6%	99.3%	99.4%	
41	96.3%	91.3%	97.3%	
44				89.9%
46			76.2%	
47	90.5%	88.5%	96.0%	91.2%
48	89.4%	94.0%	92.9%	95.6%
49	91.3%	96.6%	96.6%	78.7%
50			100.0%	
51		87.2%	84.9%	100.0%
52	92.8%			
54		100.0%		
55	94.0%	95.6%	90.3%	
57	93.2%	93.4%	93.4%	93.7%
62			53.5%	
66		3.3%		
71	50.5%		69.0%	
76	93.7%	84.5%		68.5%
91			63.5%	
97			86.2%	93.2%

MAINTENANCE & OPERATIONS

New Construction - Design to Construction Cost Ratio



District	2015-2016	2016-2017	2017-2018	2018-2019
4	1.4%	6.6%		
5		6.2%	46.3%	
8	7.0%	61.8%	76.2%	110.3%
9	131.6%	9.0%	25.0%	7.7%
10	6.4%	3.9%	16.6%	12.3%
13		2.4%	36.6%	54.6%
14	0.8%	0.9%	7.1%	4.1%
16	13.0%		13.0%	
18	18.6%		8.0%	4.1%
20				13.2%
28				2.4%
30	11.0%			
37	4.4%			
41	2.5%	7.4%	1.7%	
44				10.2%
46	7.2%		31.3%	
47	10.0%	12.4%	3.7%	8.3%
48	9.9%	6.0%	5.1%	4.0%
49	5.0%	2.1%	1.2%	8.0%
51		9.1%	13.6%	
52	7.5%			
55	6.4%	4.6%	10.7%	
57	7.1%	7.0%	7.0%	6.5%
62			78.5%	
71	90.6%		38.5%	
76	4.9%	9.4%		44.7%
91			49.1%	
97			14.7%	4.1%

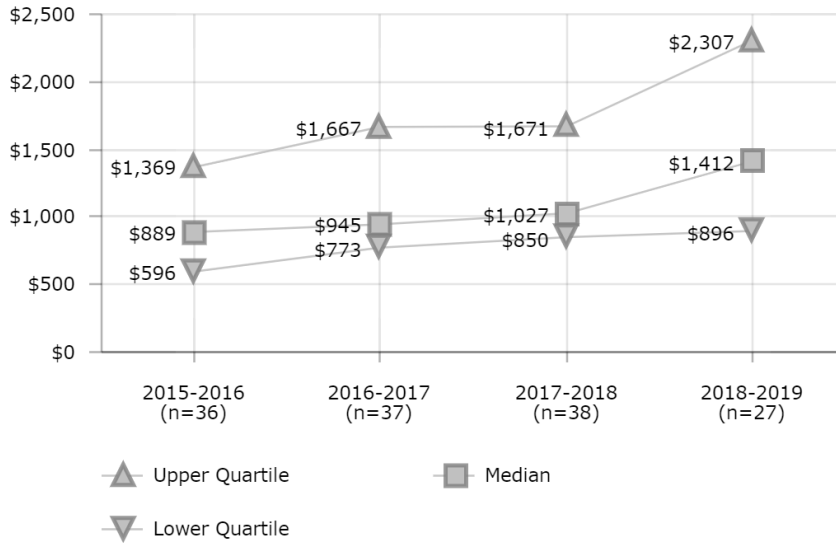
Description of Calculation

Design costs of all new construction projects, divided by construction costs of all new construction projects.

Importance of Measure

This can be used to evaluate the cost of delivered construction relative to design costs.

MAINTENANCE & OPERATIONS
M&O Cost per Student



Description of Calculation

Total custodial costs (district and contractor) plus total grounds work costs (district and contractor) plus total routine maintenance costs (district and contractor) plus total major maintenance/ minor renovations costs plus total major rehab/ renovations divided by enrollment.

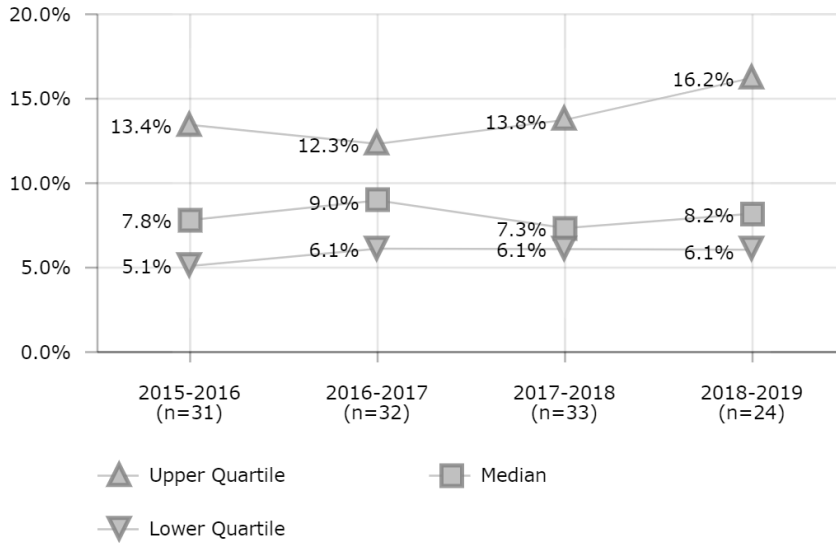
Importance of Measure

This is a broad view of the costs of maintenance, operations and facilities work. Expenditures may fluctuate drastically depending on the number of capital projects.

District	2015-2016	2016-2017	2017-2018	2018-2019
3	\$1,394	\$2,210		\$2,307
4	\$914	\$891	\$1,000	\$809
5			\$968	
7	\$1,344	\$1,127	\$1,309	\$1,065
8	\$427	\$449	\$540	\$970
9	\$631	\$1,763	\$1,749	\$1,742
10	\$834	\$794	\$753	
12	\$2,386	\$1,847	\$1,825	\$1,412
13	\$537	\$718	\$782	\$896
14	\$2,123	\$2,091	\$2,349	\$2,388
16	\$1,571		\$2,237	
18	\$771	\$553	\$1,300	\$1,992
19		\$1,800		
20	\$618	\$895	\$683	\$1,165
23			\$1,671	
25		\$938	\$853	\$834
27				\$2,788
28	\$2,636	\$1,408	\$1,147	\$2,656
30	\$1,161	\$988	\$888	\$841
32	\$510	\$623	\$571	\$602
34	\$1,049			
35	\$347	\$892	\$982	\$1,592
37	\$1,301	\$482		
39	\$2,327	\$5,434	\$5,217	
41	\$1,251	\$1,141	\$1,628	
43	\$2,925	\$2,639	\$2,769	\$2,175
44	\$574	\$641	\$632	\$760
46	\$361	\$439	\$499	
47		\$1,667	\$1,553	
48	\$1,679	\$3,517	\$2,014	\$2,798
49	\$864	\$1,409	\$973	
50		\$697	\$1,032	\$1,058
51	\$435	\$817	\$1,021	\$1,448
53		\$1,472	\$948	\$1,107
54	\$475			
55	\$1,009	\$1,051	\$929	
57	\$8,157		\$7,774	\$7,057
58	\$702			
63	\$1,188	\$1,013	\$1,100	
66	\$728	\$773		
67	\$548		\$824	\$937
71	\$1,310	\$1,709	\$1,404	
74	\$705			
76		\$930		\$2,845
79		\$483	\$850	
91	\$830	\$945	\$1,560	
97		\$882	\$2,437	\$1,821
431			\$192	\$207

MAINTENANCE & OPERATIONS

M&O Costs Ratio to District Operating Budget



District	2015-2016	2016-2017	2017-2018	2018-2019
1				5.8%
3	5.1%	13.4%		13.5%
4	7.5%	7.2%	7.2%	6.1%
7	11.8%	9.7%	11.3%	8.4%
8	5.4%	5.7%	6.7%	11.6%
9	7.6%	20.7%	20.8%	19.7%
10	8.5%	7.5%	6.6%	
12	13.4%			7.2%
13	5.8%		8.2%	9.1%
14	22.3%	22.0%	25.2%	22.6%
16	21.8%			
18		4.2%	10.4%	15.3%
20	2.4%	3.5%	2.8%	4.4%
23			13.8%	
25			3.4%	3.3%
27				23.8%
28	16.9%	9.0%	7.3%	
30	7.8%	6.8%	6.1%	5.6%
32	6.5%	7.9%	7.2%	7.1%
34	6.7%			
35	1.7%	4.3%	4.7%	7.5%
37	14.5%			
39	25.1%	57.1%		
41	11.8%	10.9%	16.3%	
43	9.6%	9.2%	8.6%	
44		7.0%	6.6%	8.0%
46	2.6%	3.2%		
47	21.9%	16.2%	13.8%	
48	18.9%	39.0%	21.5%	28.3%
49	8.0%	39.1%		
50		5.7%	6.0%	6.0%
51	4.3%	7.2%	10.3%	13.0%
53		11.3%	6.8%	7.0%
54	4.0%		2.7%	
55		11.1%	9.6%	
57		34.4%	25.9%	21.0%
58	4.3%			
63	7.6%	6.5%	6.5%	
67	4.1%		6.0%	6.0%
71	9.0%	10.9%	7.7%	
79		2.4%	3.6%	
91	9.3%	10.6%	18.7%	
97		9.0%	23.2%	17.2%
431		2.0%	1.8%	

Description of Calculation

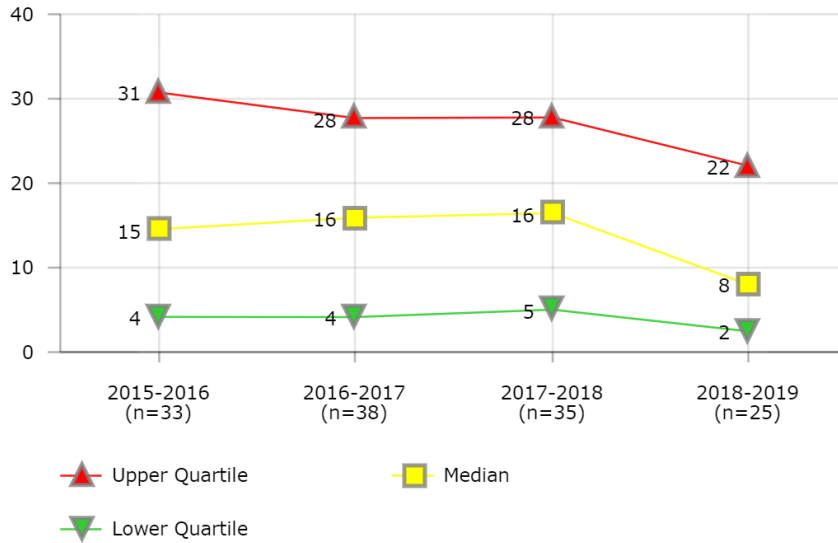
Total custodial costs (district and contractor) plus total grounds work costs (district and contractor) plus total routine maintenance costs (district and contractor) plus total major maintenance/minor renovations costs plus total major rehab/renovations

Importance of Measure

This is a broad view of the costs of maintenance, operations and facilities work. Expenditures may fluctuate drastically depending on the number of capital projects.

MAINTENANCE & OPERATIONS

Work Order Completion Time (Days)



Description of Calculation

Total aggregate number of days to complete all work orders, divided by total number of work orders.

Importance of Measure

This measure is an indicator of a district's timeliness in completing work orders

Districts with lower completion times are more likely to have a management system in place with funding to address repairs.

Factors that Influence

- Number of maintenance employees
- Management effectiveness
- Automated work order tracking
- Labor agreements
- Funding to address needed repairs
- Existence of work flow management process

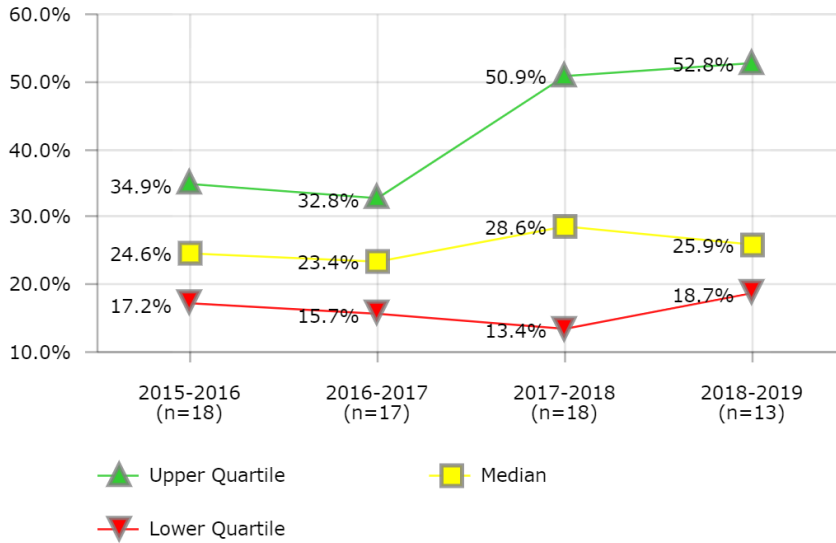
Districts in Best Quartile (2018-2019)

- Clark County School District
- Detroit Public Schools
- Fresno Unified School District
- Guilford County School District
- Jefferson County Public Schools (KY)
- Oklahoma City Public Schools
- Seattle School District 1

District	2015-2016	2016-2017	2017-2018	2018-2019
1				1
3	31	27	28	
4	5	4	15	14
5			34	
7	15	23	33	35
8	27	55	45	45
9	1	1	26	2
10	26	26	18	13
12	26	29		16
13	32	35	25	21
14	5	5	5	6
16	4	4	4	
18	1	28	0	
19		2		
20	11	7	9	6
23			13	
25		2	6	28
27				7
28	55	12		
29		22		
30	40	59	51	37
32	44	50	48	72
34	69			
35				20
37	33	24		
39	24	34	36	
41	40	19	19	
43	68	52	51	51
44	11	10	9	8
46	14	20	24	
47		16	2	22
48		0	4	4
49	0	0	0	0
50		1	7	0
51	3	14	12	0
52	9			
53		30	19	0
54	0	0		
55	16	16	16	
58	0			
62			1	
63	5	6	17	
66	0	49	41	
67		0	0	0
71	2	15		
74	15			
79			0	
91	19	19	17	
431		5	5	5

MAINTENANCE & OPERATIONS

Recycling - Percent of Total Material Stream



District	2015-2016	2016-2017	2017-2018	2018-2019
1				76.7%
3	42.6%	47.3%	48.2%	42.0%
7				8.7%
8	16.4%	16.6%	18.0%	18.7%
9	34.9%	42.9%	58.2%	52.8%
12	17.9%	15.6%	18.6%	18.2%
14	39.5%	28.4%	31.6%	
16	33.3%	34.4%	33.0%	
23			13.4%	
26		27.3%		
28	100.0%		5.7%	7.6%
30	23.3%	23.4%	59.7%	68.1%
37	14.9%	14.9%		
41	22.1%	21.3%	20.7%	
43	6.8%	5.2%	13.4%	
44	25.9%	25.9%	25.6%	25.9%
48	53.9%	56.0%	55.2%	
52	27.8%			22.9%
54			50.9%	
55	17.2%	13.2%	13.2%	
66	16.0%	15.7%	9.3%	
67	30.9%	32.8%	32.5%	32.3%
76	17.9%	16.4%		19.2%
97			88.9%	97.7%

Description of Calculation

Total material stream that was recycled (in tons), divided by total material stream (in tons).

Importance of Measure

This measures the degree to which districts recycle.

Factors that Influence

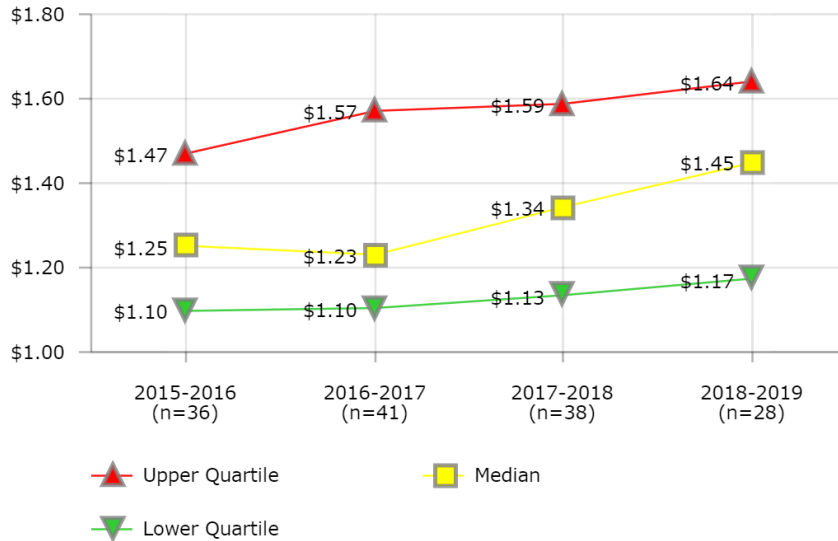
- Placement of recycling bins near waste bins
- Number of recycling bins deployed
- Material collection contracts
- Commitment to environmental stewardship
- State requirements

Districts in Best Quartile (2018-2019)

- Clark County School District
- Milwaukee Public Schools
- Pinellas County Schools
- Seattle School District 1

MAINTENANCE & OPERATIONS

Utility Costs - Cost per Square Foot



Description of Calculation

Total utility costs (including electricity, heating fuel, water, sewer), divided by total square footage of all non-vacant buildings.

Importance of Measure

This measures the efficiency of the district's building utility operations

It may also reflect a district's effort to reduce energy consumption through conservation measures being implemented by building occupants as well as maintenance and operations personnel.

Higher numbers signal an opportunity to evaluate fixed and variable cost factors and identify those factors that can be modified for greater efficiency.

Factors that Influence

- Age of buildings and physical plants
- Amount of air-conditioned space
- Regional climate differences
- Customer support of conservation efforts to upgrade lighting and HVAC systems
- Energy conservation policies and management practices

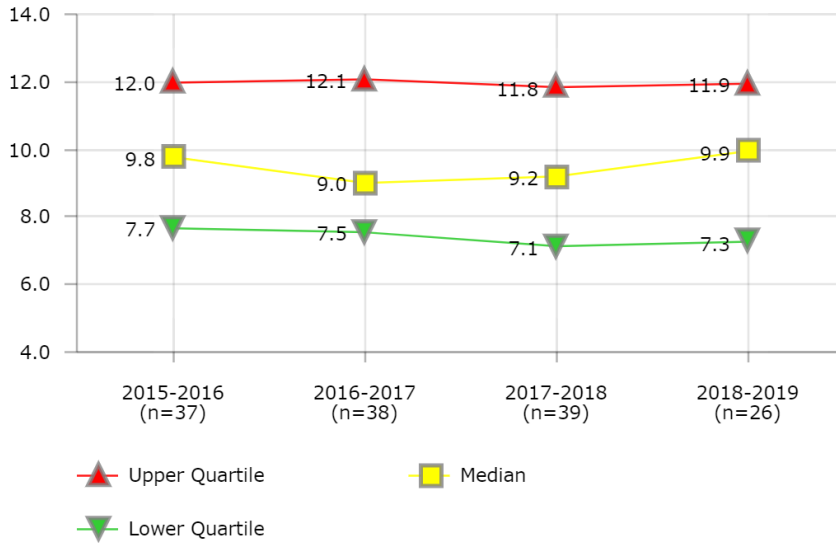
Districts in Best Quartile (2018-2019)

- Des Moines Public Schools
- Duval County Public Schools
- El Paso Independent School District
- Palm Beach County School District
- Seattle School District 1
- St. Paul Public Schools
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1				\$0.44
3	\$0.89	\$0.99	\$1.03	\$0.77
4	\$1.34	\$1.15	\$1.14	\$1.14
5		\$0.96	\$0.81	
7	\$1.44	\$1.52	\$1.66	\$1.73
8	\$1.07	\$1.07	\$1.13	\$1.12
9	\$1.93	\$1.97	\$1.52	\$2.03
10	\$1.60	\$1.49	\$1.55	\$1.47
12	\$0.89	\$0.94	\$1.00	\$0.84
13	\$1.38	\$1.34	\$1.06	
14	\$1.18	\$1.22	\$1.05	
16	\$1.03		\$0.89	
18	\$1.45	\$1.19	\$1.48	\$1.60
19		\$1.10		
20	\$1.60	\$1.91	\$1.68	\$1.60
23			\$1.59	
25				\$1.19
26		\$1.07		
27				\$1.62
28	\$1.61	\$1.56	\$1.34	\$1.26
30	\$1.14	\$1.24	\$1.22	\$1.22
32	\$1.10	\$1.58	\$1.12	\$1.60
34	\$1.66			
35				\$1.66
37	\$0.84	\$0.94		
39	\$1.13	\$1.46	\$1.10	
41	\$1.49	\$1.46	\$1.86	
43	\$1.28	\$1.21	\$1.26	
44	\$1.15	\$1.18	\$1.16	\$1.16
46	\$1.01	\$1.11	\$1.22	\$1.26
47	\$1.75	\$1.73	\$1.59	\$1.70
48	\$1.68	\$1.57	\$1.65	\$1.76
49	\$1.45	\$1.57	\$5.47	\$1.68
50		\$0.62	\$1.34	\$1.43
51	\$1.14	\$1.07	\$1.42	
52	\$1.31			\$1.24
53		\$1.62	\$1.58	\$1.52
54	\$0.89	\$0.92		
55	\$1.20	\$1.23	\$1.24	
58	\$1.10			
62			\$1.36	
63	\$1.50	\$1.60	\$1.65	
66	\$1.23	\$1.13	\$1.18	
67		\$2.11	\$2.19	\$2.32
71	\$1.45	\$1.62	\$1.36	
74	\$0.93	\$1.14		
76	\$1.33	\$1.65		\$1.54
79		\$1.91	\$2.15	
91	\$1.18	\$0.91	\$0.87	
97		\$1.50	\$1.45	\$1.42
431		\$1.16	\$1.15	\$1.14

MAINTENANCE & OPERATIONS

Utility Usage - Electricity Usage per Square Foot (KWh)



Description of Calculation

Total electricity usage (in kWh), divided by total square footage of all non-vacant buildings.

Importance of Measure

This measures the level of electricity usage. Districts with high usage should investigate ways to decrease usage in order to reduce costs.

Factors that Influence

- Use of high-efficiency lightbulbs
- Automated light switches
- Shutdown policy during winter break
- Regulation of heating and air conditioning

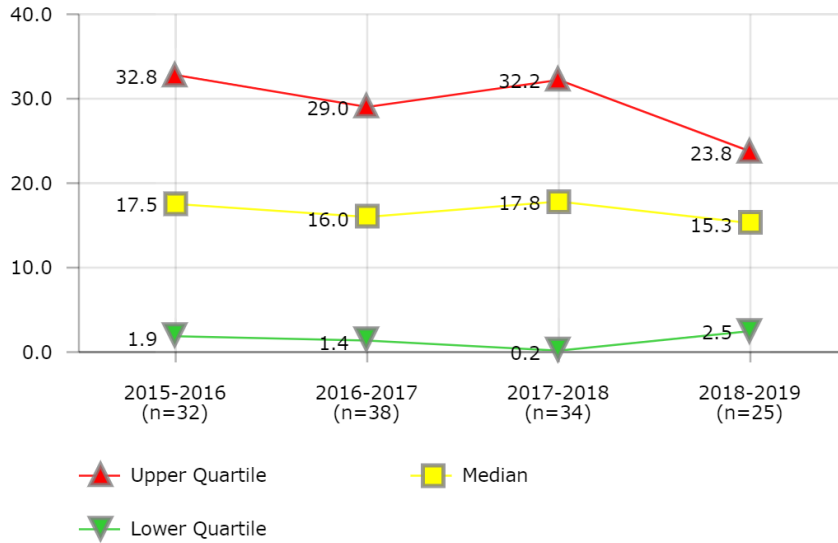
Districts in Best Quartile (2018-2019)

- Baltimore City Public Schools
- Detroit Public Schools
- El Paso Independent School District
- Jefferson County Public Schools (KY)
- Milwaukee Public Schools
- Seattle School District 1
- St. Paul Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1				5.0
3	6.0	6.2	6.4	6.2
4	11.6	9.3	8.9	8.3
5		4.6	4.3	
7	8.4	8.5	7.7	7.6
8	11.5	11.9	18.9	11.9
9	13.5	14.3	13.8	13.9
10	12.2	12.1	12.2	11.8
12	8.3	8.5	8.8	8.6
13	14.4	14.1	13.8	
14	6.5	6.3	6.1	
16	5.1		4.3	
18	10.1	8.3	9.1	10.3
20	11.7	12.9	12.8	12.9
23			10.1	
26		4.8		
27				12.8
28	13.5	13.6	11.7	11.8
30	6.2	6.7	6.6	6.3
32	15.8		15.2	16.4
34	11.2			
35				10.9
37	6.9	6.6		
39	16.4	17.3	12.3	
41	14.7	14.7	16.2	
43	7.5	7.5	7.1	
44	10.0	10.2	9.8	9.5
46	7.7	7.7	7.8	1.4
47	12.0	13.0	11.2	11.8
48	13.7	13.3	13.6	13.6
49	8.7	8.8	10.5	11.2
50			7.3	7.3
51	9.6	9.1	8.5	
52	7.5			
53		10.4	10.0	1.4
54	7.8	8.9	8.2	
55	9.1	9.6	9.5	
58	6.1			
62			6.2	
63	10.6	7.6	7.1	
66	9.8	9.2	9.8	
67	9.1	8.9	9.2	9.0
71	11.5	12.0	11.8	
74	4.8	4.5		
76	13.0	15.0		13.7
79		4.8	5.0	
91	9.2	8.9	8.8	
97		11.0	9.8	9.6
431		7.1	7.1	7.1

MAINTENANCE & OPERATIONS

Utility Usage - Heating Fuel Usage per Square Foot (KBTU)



Description of Calculation

Total heating fuel usage (in kBTU), divided by total square footage of all non-vacant buildings.

Importance of Measure

This measures the level of heating fuel usage. Heating fuel can be in a variety of forms, such as fuel oil, kerosene, natural gas, propane, etc. This excludes electricity that is used for heating.

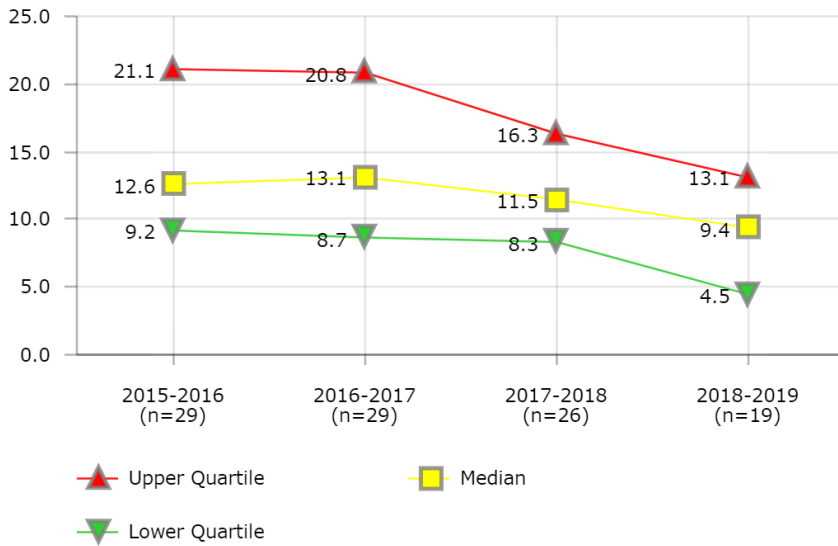
Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Detroit Public Schools
- Duval County Public Schools
- Hillsborough County Public Schools
- Orange County Public School District
- Palm Beach County School District
- Pinellas County Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1				3.0
3	41.2	43.4	48.3	49.8
4	33.2	27.8	31.3	30.9
5		55.6	43.4	
7	138.7	140.1		64.2
8	0.9	1.1	1.3	1.3
9	0.2	16.7	0.2	13.9
10	1.5	1.4	1.4	1.5
12	18.0	17.0	20.4	21.1
14	0.4	0.4	0.0	0.2
16	5.3	6.0	4.5	
18	15.1	0.1	18.0	19.3
20	28.0	30.2	35.7	34.4
26		0.6		
28	11.9	11.1	8.3	12.1
30	45.7	50.1	60.2	58.6
34	30.3			
35	0.7	0.7		39.2
37	37.6			
39	7.0	5.8	0.0	
41	10.7	9.6	0.0	
43	56.2	52.1	64.5	
44				1.1
46	32.4	35.5	41.1	7.8
47	16.8	13.4	17.7	15.9
48	2.2	2.1	1.9	2.5
49	21.0	22.9	30.0	21.5
50		20.3	0.0	0.5
51	19.6	18.8	22.1	
53		19.1	23.7	23.5
54	0.0	49.0	46.1	
55	17.0	14.6	32.6	
62			0.1	
63	47.4	0.0	32.2	
66	27.2	26.2	29.9	
67	22.3	22.4	0.0	23.8
71		0.1	12.7	
74	44.2	47.5		
76	0.1	9.9		12.7
79		0.0	0.1	
91	0.3	29.0	27.9	
97		0.0	0.0	0.0
431		15.3	15.3	15.3

MAINTENANCE & OPERATIONS

Utility Usage - Water (Non-Irrigation) Usage per Square Foot (Gal.)



District	2015-2016	2016-2017	2017-2018	2018-2019
1				4.5
3	9.2	8.8	8.7	8.0
4	9.4	0.0	7.0	6.7
5		1.0	8.9	
7	7.1	7.2	7.0	7.0
9		92.7		
10	15.3	15.1	12.3	11.2
12	12.6	12.9	14.6	
13	168.8	37.6		
14	21.1	20.8	16.0	85.2
16		6.6		
18	0.0		0.0	0.0
20	10.5	11.0	9.9	9.7
23			11.1	
26		8.7		
27				3.3
28	9.2	10.4	8.3	7.4
30	21.5	22.8	22.1	27.0
32	0.4			0.0
35	0.3			9.7
37	6.7	7.9		
41	23.4	21.2	18.6	
43	8.8	8.7	8.4	
46	11.8	15.3	14.0	38.6
47	15.0	17.7	1.7	
48	16.1	15.3		13.1
49	30.2	32.5	16.3	
50			36.4	0.0
51	12.0	0.0	0.2	
52	13.7			
53		22.9	21.0	21.1
55	12.5	13.1	11.8	
58	13.0			
62			137.3	
63	22.0		0.1	
66	13.5	13.3	12.7	
67	22.3			
71		25.4		
74		0.0		
76		11.3		11.9
91	22.0	19.9	19.9	
97		12.0	9.8	9.4

Description of Calculation

Total water usage (in gallons) excluding irrigation, divided by total square footage of all non-vacant buildings.

Importance of Measure

Can be used to evaluate water usage.

Factors that Influence

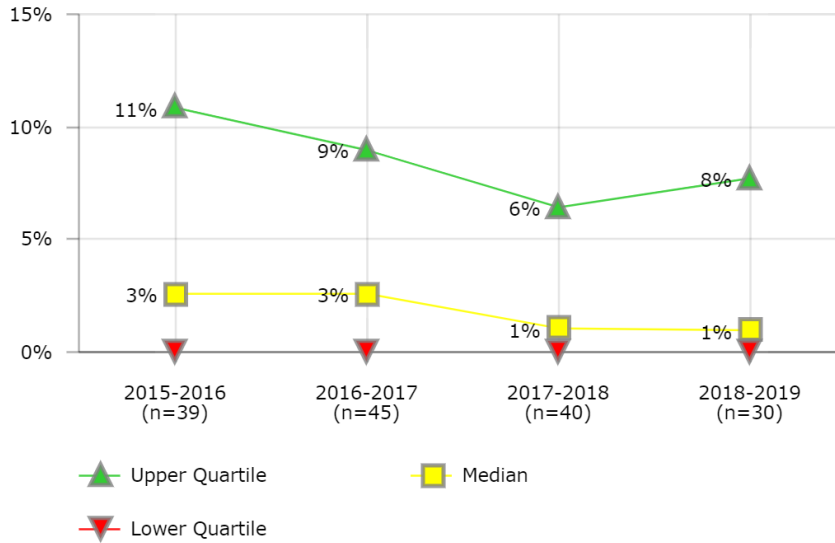
- Low-flow toilets and urinals
- Maintenance of faucet aerators
- Motion-sensor faucets to reduce vandalism

Districts in Best Quartile (2018-2019)

- Detroit Public Schools
- Miami-Dade County Public Schools
- Norfolk School District
- Seattle School District 1
- Shelby County Schools

MAINTENANCE & OPERATIONS

Green Buildings - Buildings Green Certified or Equivalent



Description of Calculation

Square footage of all permanent buildings (academic and non-academic) with a green building certificate, plus square footage of all permanent buildings (academic and non-academic) that were built in alignment with a green building code but not certified.

Importance of Measure

This measure compares the number of energy efficient or "green" buildings in the district.

Factors that Influence

- Community support for environmental and sustainability measures
- Grant availability
- District policy
- Environmental site assessment
- Local health issues

Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Cincinnati Public Schools
- Cleveland Metropolitan School District
- Columbus Public Schools
- Guilford County School District
- Metropolitan Nashville Public Schools
- Minneapolis Public Schools
- Norfolk School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1				0%
3	0%	0%	0%	0%
4	0%	0%	0%	0%
5		9%	8%	
7	4%	4%	4%	4%
8	5%	5%	5%	5%
9	5%	6%	5%	5%
10	1%	1%	1%	1%
12	0%	0%	0%	0%
13	0%	0%	5%	6%
14	67%	66%	80%	
16	14%	0%	0%	
18	0%	0%	0%	0%
19		0%		
20	100%	100%		97%
23			1%	
25		4%		4%
26		0%		
27				10%
28	31%	30%	27%	27%
30	0%	0%	0%	0%
32	1%	1%	0%	0%
34	0%			
35		0%	0%	11%
37	11%	12%		
39	9%	9%	0%	
41	10%	10%	10%	
43	0%	0%	0%	0%
44	5%	5%	5%	5%
46	1%	3%	5%	0%
47	20%	10%	8%	8%
48	20%	23%	28%	
49	22%	23%	23%	21%
50		7%	12%	0%
51	0%	0%	0%	
52	2%			20%
53	0%	1%	0%	0%
54	0%	0%	0%	
55	1%	0%	0%	
57	54%	54%	54%	20%
58	3%			
62			0%	
63	0%	0%	0%	
66	4%	4%	4%	
67	0%	0%	0%	0%
71	11%	11%	11%	
74	11%	11%		
76	0%	0%		0%
79		0%	0%	
91	3%	3%	3%	
97		7%	4%	1%
431		0%	0%	0%

Safety & Security

There are a number of performance metrics that can be used to determine a district's relative performance in the area of school safety. For instance, the *use of ID badges and other methods of access control* are important parts of security, as are measures of *use of alarm systems and Expenditures as a Percent of General Fund*. Additionally, personnel preparedness and capacity is measured by looking at **Hours of Training per District Security and Law Enforcement Member** and **District Uniformed Personnel**.

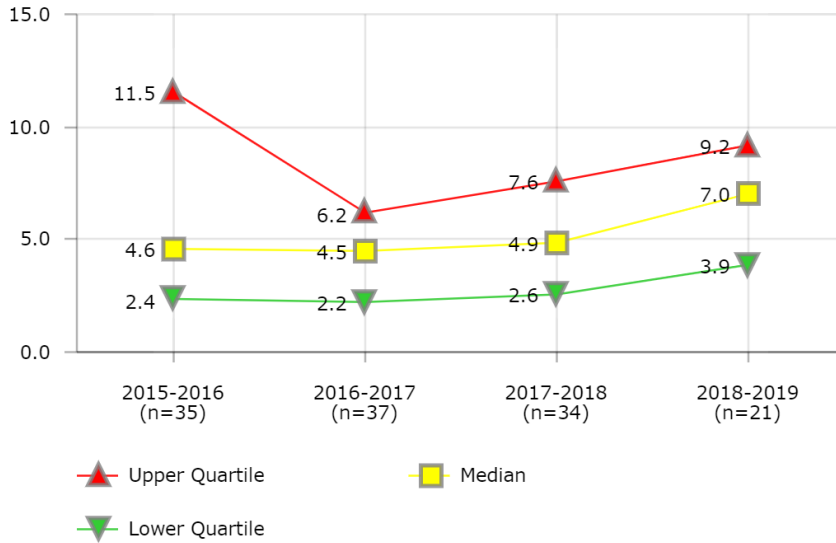
Finally, **People Incidents per 1,000 Students** and **Assault/ Battery Incidents per 1,000 Students** are baseline measures of incidents in a district.

The following influencing factors are likely to apply to these measures:

- Level of crime in the surrounding neighborhoods
- Configuration of school (office, front desk, etc.) to make access control a possibility
- Inclusion of security systems in a district's construction and modernization program
- Utilization of technology such as security cameras to offset the need for more staff
- Documented need for additional safety and security staff—for example, documented crime statistics and trends.

SAFETY & SECURITY

Incidents - Assault/Battery Incidents per 1,000 Students



Description of Calculation

Total number of assault/battery incidents, divided by total student enrollment over one thousand.

Importance of Measure

This gives districts an idea of the density of incidents in each district, adjusted for the size of the district in terms of enrollment.

Factors that Influence

- Available resources to allocate for safety and security
- Staffing formulas
- Documented need for additional safety and security staff through data such as crime statistics
- Utilization of technology such as security cameras to offset the need for more staff
- Enrollment

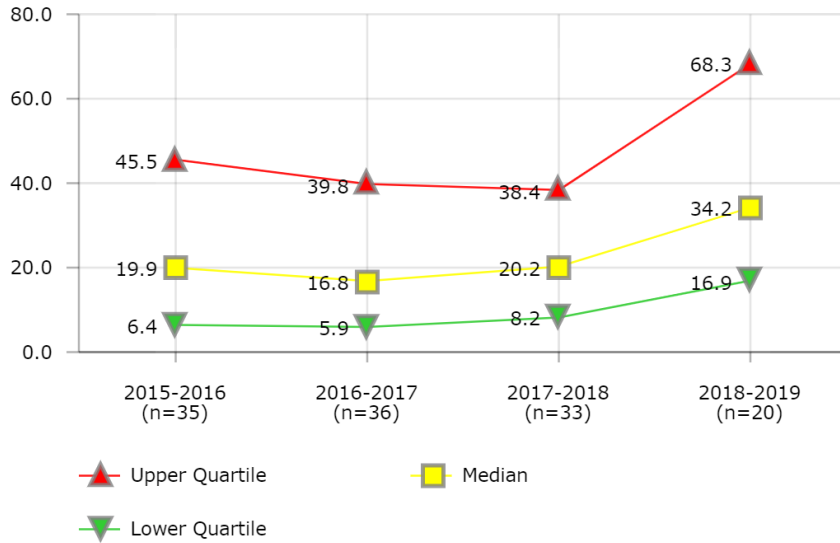
Districts in Best Quartile (2018-2019)

- Anchorage School District
- Jefferson County Public Schools (KY)
- Miami-Dade County Public Schools
- Norfolk School District
- Palm Beach County School District
- St. Paul Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
2	21.4			
3	2.6	2.7	2.3	2.5
4	17.8	18.0	20.8	26.0
7	2.5	0.6	1.3	3.0
8	3.4	2.9	3.5	2.7
9	4.4	6.2	6.0	9.2
10	9.3			
12	1.0	0.7	0.3	8.2
14	4.1	3.5	5.1	4.2
16	2.4		2.6	
18	7.2	7.0	7.6	7.1
19		4.5	5.0	
20	0.1	0.2	15.4	
25	2.3	1.9	2.6	15.1
26		11.5		
27				2.7
28	5.0	5.6	7.5	6.5
29		4.4		
32	1.7	1.6	1.4	1.7
34	27.1			
35	4.0	2.2	4.5	7.0
37	4.6	4.6	4.4	
39	1.6	4.1	3.8	
41	1.6	1.7	2.2	
43	7.9	0.9	9.8	7.3
44	1.9	2.0	1.8	6.9
46	4.6	6.2	1.7	
47		14.3	14.8	
48	21.0	12.4	13.2	15.1
49	4.6	5.5	5.8	
50		6.5	7.1	6.1
51	11.5	5.3		53.0
53		5.4	4.2	3.9
54	6.4	5.9	6.7	
55	2.3	2.9	2.8	
57	15.8	13.4	12.2	14.8
58	9.3		7.9	
63	14.5	0.6	0.5	
66	59.0	64.8		
71	12.9	11.3	11.4	
74	6.9			
79		4.5	4.7	7.6
91	4.0	4.3		
431		5.4	6.0	

SAFETY & SECURITY

Incidents - People Incidents per 1,000 Students



District	2015-2016	2016-2017	2017-2018	2018-2019
2	45.7			
3	82.5	117.0	104.3	71.8
4	58.1	61.9	65.2	64.7
7	18.9	5.1	16.0	64.3
8	5.8	4.9	5.7	5.3
9	20.2	243.6	25.0	228.1
10	24.8			
12	19.2	22.7	47.0	20.5
14	12.5	17.5	34.5	34.6
16	11.9		39.2	
18	7.8	7.7	8.1	7.7
19		4.5	5.0	
20	1.1	0.9	59.4	
25	5.9	4.1	11.3	36.5
26		40.6		
27				9.5
28	22.1	8.7	34.6	27.6
29		23.3		
32	3.8	2.7	2.5	2.7
34	41.0			
35	14.3	9.2	13.6	263.1
37	38.9	43.8	38.4	
39	2.4	16.2	16.3	
41	2.1	2.0	2.7	
43	22.5	19.7	20.2	21.7
44	55.7	39.0	7.9	108.0
46	9.9	7.0	4.0	
47		770.3	757.4	
48	45.5	36.3	31.3	33.8
49	255.3	228.8	229.3	
50		8.5	9.4	13.4
51	11.9	41.4		886.3
54	6.4	5.9	238.1	
55	4.3	5.9	6.0	
57	34.0	31.3	33.0	43.7
58	26.4		21.0	
63	60.4	33.8	18.1	
66	128.5	160.4		
71	19.9	18.8	17.4	
74	49.3			
79		9.0	21.2	30.1
91	4.0	4.3		
431		8.1	8.2	

Description of Calculation

Total number of people incidents, divided by total student enrollment over one thousand.

Importance of Measure

This gives districts an idea of the density of incidents in each district, adjusted for the size of the district in terms of enrollment.

Factors that Influence

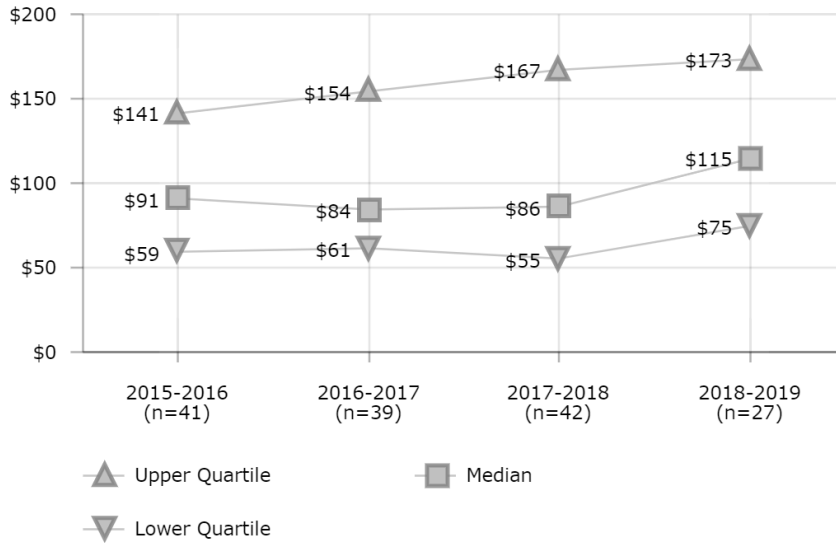
- Available resources to allocate for safety and security
- Staffing formulas
- Documented need for additional safety and security staff through data such as crime statistics
- Utilization of technology such as security cameras to offset the need for more staff
- Enrollment

Districts in Best Quartile (2018-2019)

- Detroit Public Schools
- Miami-Dade County Public Schools
- Norfolk School District
- Palm Beach County School District
- Shelby County Schools

SAFETY & SECURITY

S&S Expenditures per 1,000 Students



Description of Calculation

Total safety and security expenditures, divided by total student enrollment over one thousand.

Importance of Measure

- This measure gives an indication of the level of support for safety and security operations as a percent of district general fund budget
- A low percentage could be an indication that security needs are not being met by the district or that other revenue sources are needed to support security for district staff and students

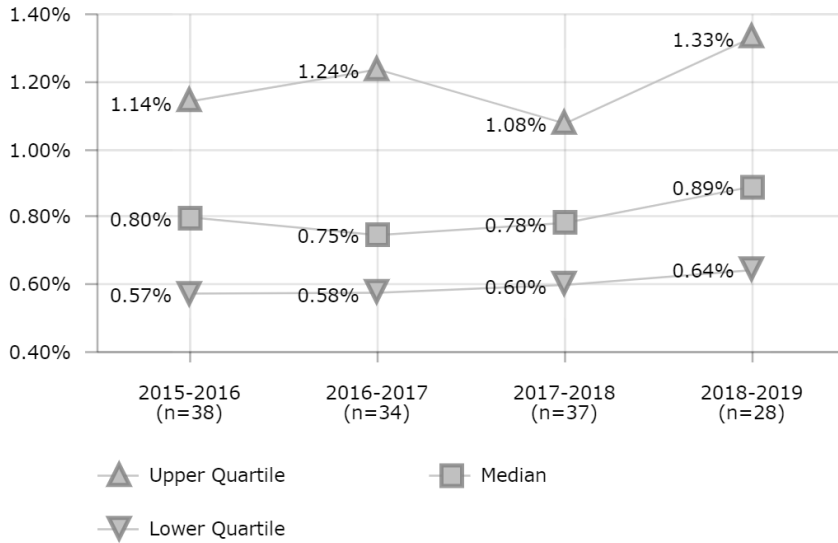
Factors that Influence

- Overall general fund budget
- Level of crime statistics of surrounding neighborhoods
- District policy for security
- Budget allocations

District	2015-2016	2016-2017	2017-2018	2018-2019
2	\$161			
3	\$68	\$69	\$69	\$72
4	\$100	\$85	\$105	\$101
5			\$44	
7	\$62	\$67	\$75	\$76
8	\$59	\$59	\$46	\$145
9	\$60	\$61	\$61	\$62
10	\$81			
12	\$49	\$64	\$66	\$75
14	\$112	\$139	\$167	\$178
16	\$52		\$49	
18	\$137	\$148	\$211	\$164
19		\$182	\$206	
20	\$153	\$154	\$149	
23			\$52	
25	\$504	\$668	\$699	\$703
26		\$53		
27				\$56
28	\$211	\$199	\$194	\$173
29		\$463		
30	\$140	\$140	\$128	\$159
32	\$54	\$52	\$55	\$115
34	\$332			
35	\$95	\$121	\$117	\$137
37	\$57	\$64	\$63	
39	\$119	\$117	\$120	
41	\$88	\$87	\$85	
43	\$257	\$216	\$294	\$339
44	\$50	\$50	\$55	\$94
46	\$141	\$70	\$41	
47		\$36	\$44	
48	\$34	\$38	\$47	\$82
49	\$41	\$45	\$49	
50			\$355	\$302
51	\$61	\$84	\$94	\$95
53		\$30	\$26	\$29
54	\$139	\$140	\$141	
55	\$96	\$82	\$88	
56	\$91		\$92	\$92
57	\$306	\$268	\$352	\$370
58	\$186		\$187	
61				\$137
62	\$15			\$1
63	\$264	\$274	\$310	
66	\$135	\$130		
67	\$88			
71	\$75	\$75	\$59	
74	\$5			
77	\$59		\$60	\$72
79		\$259	\$145	\$171
91	\$69	\$70	\$63	
97		\$65		
431		\$53	\$70	
1728	\$199	\$198	\$209	\$257

SAFETY & SECURITY

S&S Expenditures Percent of District Budget



District	2015-2016	2016-2017	2017-2018	2018-2019
1				0.53%
2	1.14%			
3	0.25%	0.42%		0.43%
4	0.84%	0.70%	0.77%	0.81%
7	0.57%	0.61%	0.68%	0.63%
8	0.76%	0.76%	0.58%	1.75%
9	0.76%	0.74%	0.74%	0.72%
10	0.85%			
12	0.28%	0.32%	0.33%	0.38%
14	1.20%	1.49%	1.82%	1.72%
16	0.73%			
18		1.20%	1.73%	1.28%
19			0.80%	
20	0.59%	0.60%	0.61%	
23			0.43%	
25	2.04%		2.83%	2.86%
27				0.48%
28	1.36%	1.27%	1.25%	
30	0.99%	1.03%	0.94%	1.14%
32	0.71%	0.68%	0.70%	1.39%
34	2.21%			
35	0.49%	0.60%	0.58%	0.65%
37	0.65%	0.63%		
39	1.29%	1.24%	1.08%	
41	0.84%	0.84%	0.86%	
43	0.87%	0.77%	0.93%	1.08%
44	0.57%	0.56%	0.60%	1.02%
46	1.06%	0.51%	0.30%	
47	0.35%	0.35%	0.39%	
48	0.39%	0.43%	0.51%	0.84%
49	0.38%	1.26%		
50		4.16%	2.18%	1.71%
51	0.63%	0.76%	0.99%	0.88%
53		0.23%	0.19%	0.19%
54	1.16%		1.19%	
55	1.07%	0.87%	0.91%	
56	1.08%		0.98%	0.90%
57		1.24%	1.18%	1.15%
58	1.15%		0.94%	
61				1.20%
62	0.14%			0.01%
63	1.68%	1.77%	1.85%	1.60%
67	0.78%			
71	0.53%	0.49%	0.33%	
77	0.76%		0.72%	0.70%
79		1.31%	0.68%	0.88%
91	0.82%	0.83%	0.78%	
97		0.68%		
431		0.58%	0.73%	
1728	1.98%	1.93%	1.97%	1.81%

Description of Calculation

Total safety and security expenditures, divided by district operating expenditures.

Importance of Measure

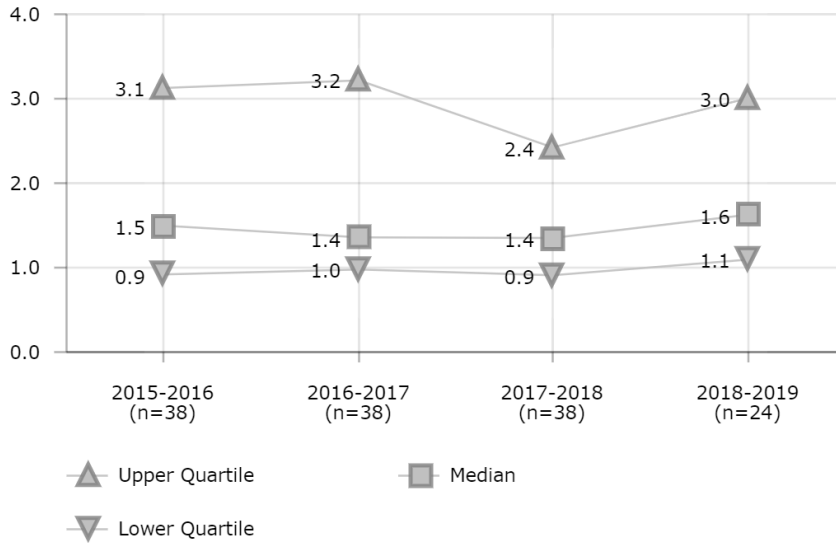
This measure gives an indication of the level of support for safety and security operations as a percent of district general operating budget

A low percentage could be an indication that security needs are not being met by the district or that other revenue sources are needed to support security for district staff and students

Factors that Influence

- Overall general fund budget
- Level of crime statistics of surrounding neighborhoods
- District policy for security
- Budget allocations

SAFETY & SECURITY
S&S Staff per 1,000 Students



Description of Calculation

Total safety and security staff, divided by total student enrollment over one thousand.

Importance of Measure

This measure gives an indication of the level of support for safety and security operations as a ratio to student enrollment

A low ratio could be an indication that security needs are not being met by the district or that other revenue sources are needed to support security for district staff and students

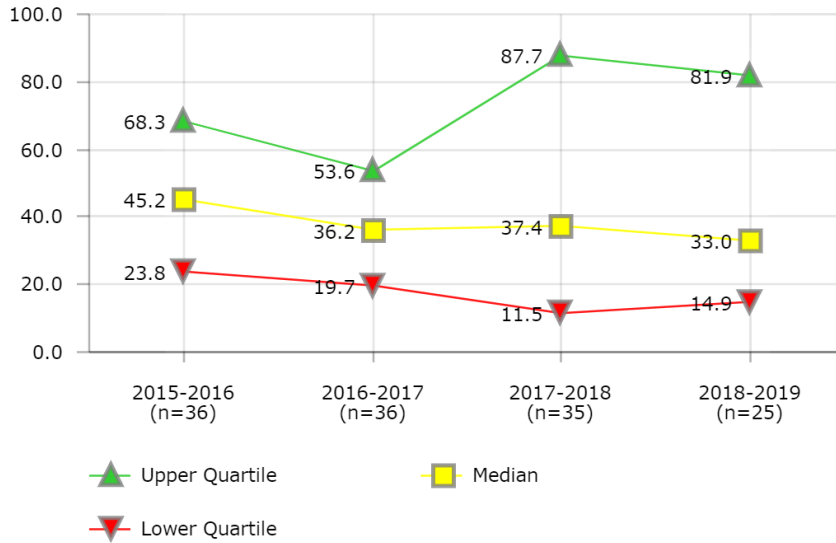
Factors that Influence

- Overall general fund budget
- Level of crime statistics of surrounding neighborhoods
- District policy for security
- Budget allocations

District	2015-2016	2016-2017	2017-2018	2018-2019
2	2.7			
3	1.6	1.7	1.6	1.5
4	1.3	1.3	1.4	1.5
5			1.3	
7	1.6	1.3	1.5	1.6
8	0.9	0.9	1.1	1.9
9	0.6	0.7	0.6	0.6
10	1.2			
12	0.6	0.7	0.6	0.6
13				0.9
14	2.4	2.4	2.4	2.5
16	0.6		0.5	
18	1.2	1.2	2.0	1.3
19		3.2	2.4	
20	3.8	3.8	3.9	
23			1.1	
25	6.3	7.1		9.6
26		1.4		
27				1.9
28	3.1	2.0	2.2	2.3
29		7.5		
30	3.7	3.4	6.5	3.7
32	3.2	3.2	3.2	4.1
34	7.4			
35	1.4	1.5	1.5	1.5
37	1.5	1.7	1.4	
39	1.3	1.3	1.2	
41	1.2	1.2	1.3	
43	3.4	3.5	4.4	4.0
44	0.7	0.7	0.7	1.7
46	1.7	1.7	1.3	
47		1.3	1.3	
48	0.8	0.8	0.9	1.2
49	0.5	0.6	0.6	
50			4.2	3.5
51	1.5	1.2	0.6	1.8
53		0.7	0.6	0.6
54	3.9	3.2	3.6	
55	1.3	1.2	1.3	
57	6.2	5.7	5.4	4.9
58	2.9		3.0	
62	0.1			
63	5.4	5.6	6.1	
66	2.9	3.3		
67	1.7			
71	1.1	1.2	1.3	
74	0.5			
79		2.4	2.4	0.8
91	0.7	0.7	0.7	
97		0.7		
431		1.0	0.9	1.0

SAFETY & SECURITY

Training Hours per Safety/Security personnel



District	2015-2016	2016-2017	2017-2018	2018-2019
1			230.0	164.3
2	103.6			
3	24.6	23.9	66.9	104.8
4	43.6	41.3	36.1	35.8
5		1.1	1.2	
7	6.7		9.2	10.4
8	170.6	174.3	202.4	23.0
9	61.3	36.7		
10	63.1			
12		52.4	129.3	75.8
14	44.0	50.0	52.0	83.3
16	68.7	66.5	54.4	
18	46.4		37.4	
19		5.0	6.3	
20	23.0	23.0	15.9	
25	4.8	16.6	17.7	8.6
26	13.5	6.8	6.0	14.9
28		95.0	220.0	287.6
29		0.1		
30	7.0	7.4	11.5	7.5
32	19.4	15.4	9.0	18.5
34	35.6			
35	41.0	41.1	87.7	99.9
37	53.9	50.9	33.4	
39	52.7	35.7	37.6	
41	40.6	41.3	40.6	
43	26.0	21.5	6.6	13.6
44	16.3	17.9	22.4	8.8
46	60.0	54.8		
47	94.0	66.8	50.0	62.1
48	68.0	70.3	79.4	81.9
49	53.8	11.2	15.8	19.0
50			0.8	25.3
51	18.6	22.3		11.1
52	33.7			
53		45.5	31.6	33.0
54	245.3	22.2	91.5	
55	60.2	43.8	43.2	
57	75.1	80.0	137.4	97.6
63	125.0	160.3	157.4	78.4
66	28.0	31.0		
67	81.5			
71	155.8	139.8	117.8	
74	15.6			
79		24.2	6.6	61.9
431		25.0	25.6	25.6

Description of Calculation

Total number of hours of safety-related drills and trainings for all safety and security personnel, divided by total number of safety and security personnel.

Importance of Measure

Most school districts complete crisis response training prior to the opening of each school year.

Factors that Influence

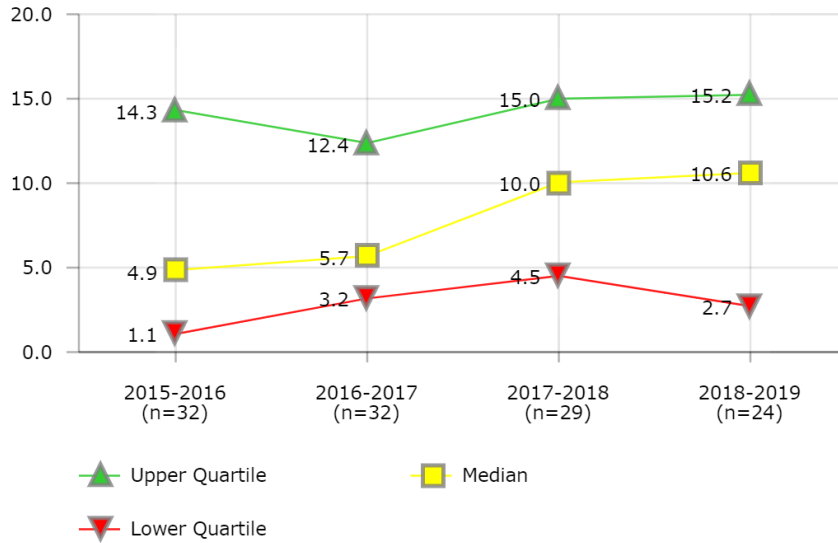
- Emergency response priority with school/district leadership
- Emergency response resources
- Thoroughness of school/district crisis response plan
- Weather

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Atlanta Public Schools
- Cleveland Metropolitan School District
- Columbus Public Schools
- Orange County Public School District
- Seattle School District 1
- St. Paul Public Schools

SAFETY & SECURITY

Crisis Response Teams - Drills per Team



Description of Calculation

Total number of team drills conducted by crisis response teams, divided by the total number of crisis response teams.

Importance of Measure

Ideally, district sites with a designated crisis response team have all conducted drills of some sort.

Factors that Influence

- Geography of district
- Priorities of district leadership
- Previous traumatic events or crisis
- Emergency response resources
- Updated procedures and protocols

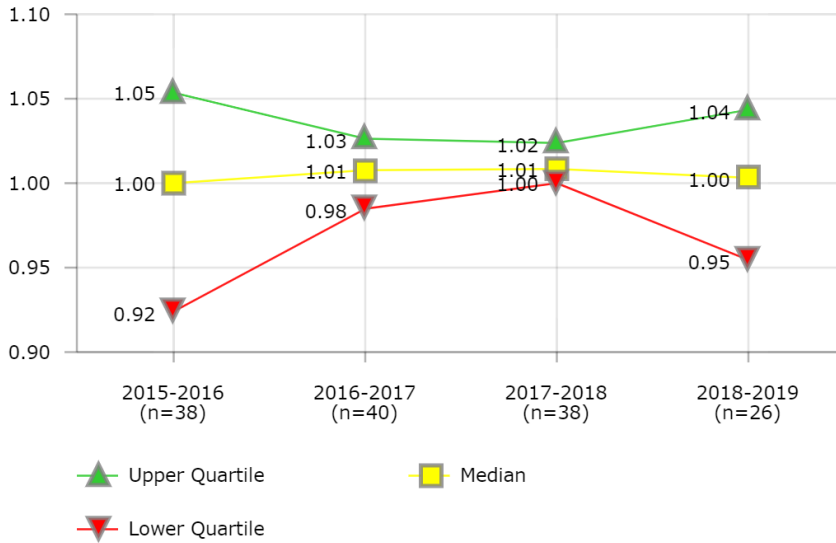
Districts in Best Quartile (2018-2019)

- Anchorage School District
- Atlanta Public Schools
- Columbus Public Schools
- El Paso Independent School District
- Metropolitan Nashville Public Schools
- Norfolk School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1			9.0	9.0
2	17.6			
3	1.1	11.2	11.2	11.2
4	4.0	6.0	4.9	15.1
5			33.6	
7	2.9	3.5	1.0	16.7
8	14.0	14.0	2.5	2.4
9	8.8		13.9	
12	13.9	12.8	12.0	12.8
14	3.4	3.4	3.4	7.9
16		4.0	1.0	
18		0.1	16.0	0.1
19			1.0	
20	3.9	3.9	4.5	
25	0.9	10.0	10.0	10.0
26	5.4	5.4	5.4	6.0
27				15.3
28	21.6	17.8	15.6	21.6
29		9.1		
32	0.0	0.0	0.0	0.0
35	21.7	27.4	29.3	25.9
37	16.6	6.4	16.5	
39	1.0	20.9		
41	4.5	4.5	4.5	
43	0.1			1.0
44	12.5	0.9	15.0	3.0
47	16.9	16.9		19.0
48	12.1	12.0	11.7	
49	14.7	0.0		
50			10.0	1.0
51	3.0	3.0		10.0
52	11.0		11.3	11.3
53		2.0	14.8	14.8
54		5.9	6.0	
55	0.0	0.0		
57	0.1	8.0	8.0	15.0
63	0.7			0.5
66	0.2			
67	2.9			
71	14.7	16.0	17.0	
74	15.0	3.9		
91	5.2	5.4		
97		2.0		
431		15.8	16.0	16.9

SAFETY & SECURITY

Crisis Response Teams - Teams per Academic Site



District	2015-2016	2016-2017	2017-2018	2018-2019
1	0.01	1.01	1.01	1.01
2	1.06			
3		1.03	1.06	1.07
4	1.06	1.06	1.06	1.06
5		1.00	0.97	
7	1.01	1.02	1.01	1.06
8	1.72	1.72	1.01	1.01
9	1.03	1.01	1.01	
10	0.86			
12	1.11	1.11	1.11	1.11
14	0.92	1.00	1.00	1.00
16	1.02	0.00	0.98	
18		0.97	0.00	1.00
19		0.04	0.04	
20	1.05	1.05	1.05	
23			1.10	
25	1.06	1.00	1.00	0.95
26	1.03	1.03	1.02	1.01
27				1.04
28	0.97	1.00	1.02	
29		1.08		
30	31.00	1.00	1.00	1.00
32	1.00	1.00	1.00	0.97
35	1.00	1.00	1.00	1.00
37	1.00	1.00	1.01	
39	0.00	0.05	0.07	
41	1.00	1.02	1.02	
43	0.85	0.85		0.95
44	0.02	1.02	0.02	0.02
46	0.17		1.02	
47	1.01	1.01	1.01	1.00
48	1.06	0.96	1.11	1.02
49	1.02	1.02	1.06	0.03
50			1.00	0.01
51	0.01	0.01		1.29
52	1.09		1.07	1.07
53		1.01	1.01	1.01
54	1.00	1.01	1.00	
55	0.99	1.14	1.01	
57	0.74	0.75	0.81	0.82
58	1.00			
63	0.04	0.04	0.04	0.11
66	0.97	0.96		
67	1.03			
71	1.12	1.10	1.10	
74	0.98	1.10		
91	1.01	1.01	1.01	
97		1.01		
431		1.01	1.01	1.01

Description of Calculation

Total number of crisis response teams, divided by the total number of academic sites.

Importance of Measure

Districts should build capacity to respond to crises by having designated crisis response teams.

Factors that Influence

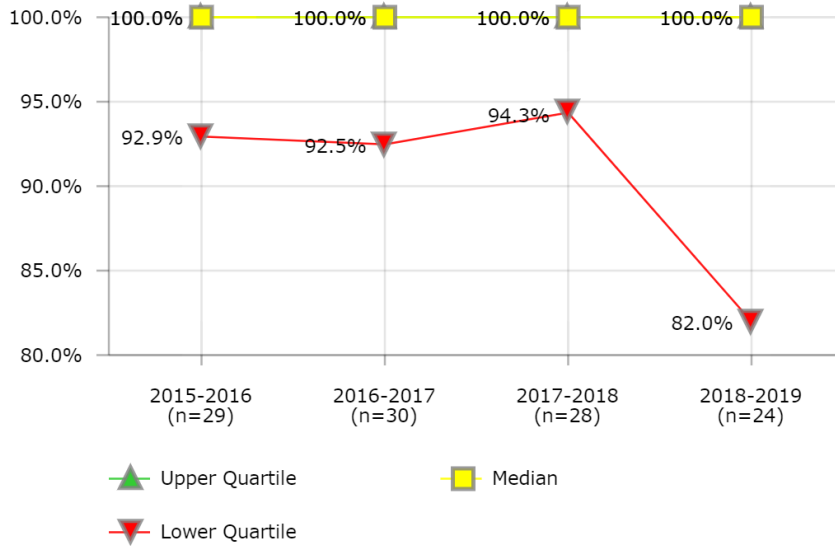
- Geography of district
- Priorities of district leadership
- Previous traumatic events or crisis
- Emergency response resources

Districts in Best Quartile (2018-2019)

- Anchorage School District
- Des Moines Public Schools
- Minneapolis Public Schools
- Norfolk School District
- Oklahoma City Public Schools
- St. Paul Public Schools
- Wichita Unified School District

SAFETY & SECURITY

Health/Safety Inspections - Sites Inspected Annually



Description of Calculation

Total number of sites/campuses (academic and non-academic) inspected annually, divided by the total number of district sites.

Importance of Measure

Regular health and/or safety inspections are important for compliance and risk mitigation.

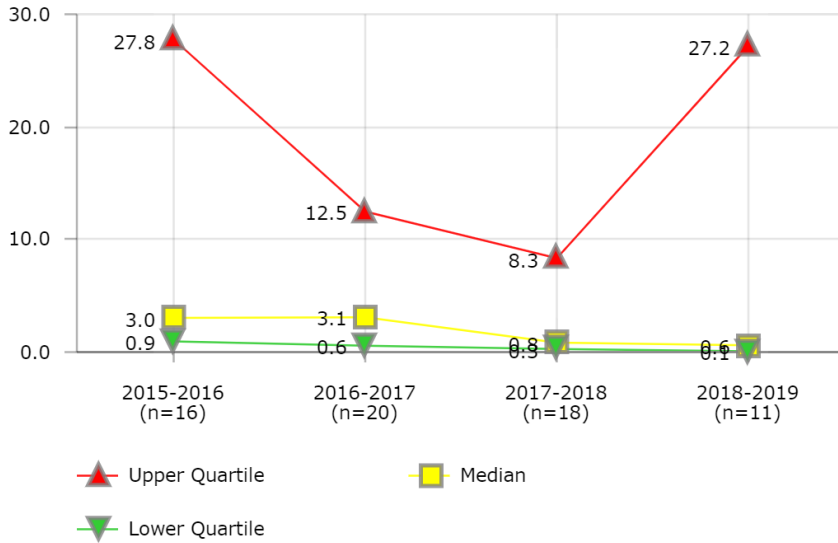
Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Anchorage School District
- Atlanta Public Schools
- Boston Public Schools
- Columbus Public Schools
- Des Moines Public Schools
- Detroit Public Schools
- El Paso Independent School District
- Jefferson County Public Schools (KY)
- Orange County Public School District
- Seattle School District 1
- St. Louis City Public School District
- Toledo Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1	100.0%	100.0%	100.0%	100.0%
3	55.6%	55.6%	51.4%	51.4%
4		3.1%	6.1%	6.1%
7	100.0%	100.0%	100.0%	100.0%
8	99.0%	102.4%	97.1%	97.1%
9	100.0%	75.4%		
10	90.6%			
12	104.3%	100.0%	100.0%	100.0%
14	92.9%	100.0%	100.0%	100.0%
16	99.2%	100.0%	100.0%	
18		27.3%	98.7%	45.5%
20	100.0%	100.0%	100.0%	
25	100.0%	100.0%	100.0%	94.3%
26	100.0%	100.0%	100.0%	100.0%
28	80.0%	100.0%	92.3%	100.0%
32	86.9%	86.9%	85.4%	83.4%
34	102.6%			
35			100.0%	100.0%
39	101.0%	93.3%	100.0%	
43	100.0%	100.0%		
44	90.7%	82.6%	83.1%	75.8%
46	100.0%		99.5%	
47	95.3%	95.4%	95.4%	94.8%
48	100.0%	96.1%	103.6%	104.5%
49	97.1%	100.0%	99.3%	
50			112.8%	100.0%
51	67.4%	93.5%	21.7%	33.9%
52	100.0%			91.1%
53		103.5%	98.9%	101.1%
54	87.9%	100.0%		
57			100.0%	80.6%
62	94.1%			
63	101.2%	100.0%	100.0%	101.3%
66	100.0%	92.5%		
74	97.9%	107.0%		
79		87.9%	93.3%	183.6%
97		100.0%		
431		100.0%	100.0%	100.0%

SAFETY & SECURITY

Health/Safety Violations per Site



District	2015-2016	2016-2017	2017-2018	2018-2019
2	2.6			
3	0.1	0.1	0.1	0.1
4	27.0	9.3	13.7	14.0
7		0.0		0.0
8	6.7	5.8	7.2	
9		5.4		
10	32.1			
12	1.1	0.2	0.3	
13		79.1		40.4
16	4.5	0.6	0.6	
18		15.6		
26	0.1		0.2	0.2
27				0.1
28		0.5	0.5	
32	28.5	28.7	20.0	27.2
39	1.6	2.7	2.4	
46	0.8			
47	3.1	3.3	8.3	9.0
48	68.5	57.9	45.7	
49	3.0	2.9	2.9	
50			1.0	
51	36.6	29.0	40.1	44.1
53		1.1	0.7	0.6
54	0.0	3.4		
57			0.2	
74		1.2		
79			0.4	
431		0.4	0.0	0.0

Description of Calculation

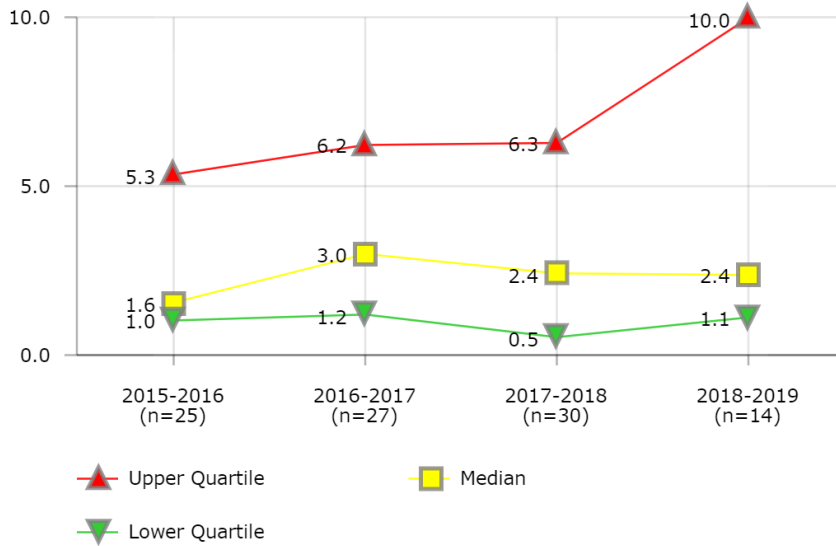
Total number of health/safety violations identified at site inspections, divided by the total number of district sites that were inspected.

Factors that Influence

- Risk mitigation efforts
- Focus of leadership on health and safety

SAFETY & SECURITY

Incidents - Bullying/Harassment per 1,000 Students



Description of Calculation

Total number of bullying/harassment incidents, divided by total district enrollment over one thousand.

Importance of Measure

This gives districts an idea of the density of incidents in each district, adjusted for the size of the district in terms of enrollment.

Factors that Influence

- Available resources to allocate for safety and security
- Staffing formulas
- Documented need for additional safety and security staff through data such as crime statistics
- Utilization of technology such as security cameras to offset the need for more staff
- Accuracy of reporting

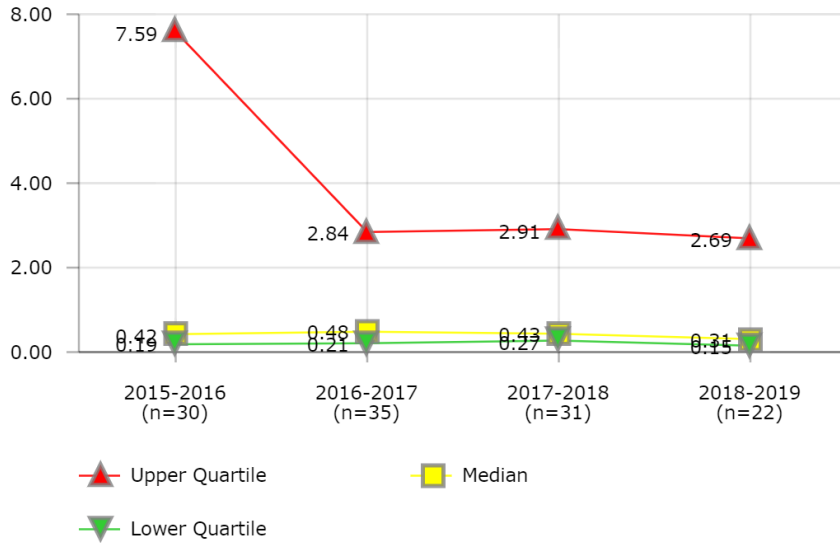
Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Cleveland Metropolitan School District
- Orange County Public School District
- Palm Beach County School District

District	2015-2016	2016-2017	2017-2018	2018-2019
2	5.3			
3	1.3	2.2	3.3	1.4
4	16.8	17.6	18.7	13.2
7	5.9	12.9	15.6	10.9
8	0.5	0.3	0.3	0.3
9	2.9	21.0	33.0	
10	2.1			
12			1.1	
14	7.0	6.2	6.3	
16	3.5		0.5	
18		6.3	10.7	6.0
19		1.4	0.9	
20	0.1	0.1	16.9	
25	1.6	2.6	5.4	
26		3.4		
27				2.1
28	0.1		0.1	0.0
32	1.4	2.5	1.1	1.3
34	1.3			
35		166.2		
37			0.0	
39	0.4	0.0	0.2	
43			0.3	
44	1.3	1.6	1.8	2.6
46	5.9		6.6	
47		5.9	4.2	
48	1.0	0.4	0.8	1.1
49	1.1	1.2	1.8	
50			0.2	
51		3.0		18.5
53		6.2	7.8	10.0
54	6.2	5.0	4.9	
55	0.9	2.5	4.4	
57	0.7	0.4	0.7	0.4
58	1.7		0.3	
63		0.2		
66	18.2	22.0		
74	4.2			
79		3.5	4.2	3.5
431		6.0	3.0	

SAFETY & SECURITY

Incidents - Intrusion/Burglary Incidents per Site



District	2015-2016	2016-2017	2017-2018	2018-2019
1	1.19	0.94	1.54	1.19
3	1.67	2.07	0.28	0.25
4	0.07	0.03	0.06	0.09
5		0.22	0.44	
7		57.69	53.40	50.00
8	0.17	0.09	0.42	
9	10.50	8.81	88.99	0.06
10	0.09			
12			0.93	0.74
14	0.32	0.38	0.41	0.32
16	0.26	10.57	0.43	
18	0.29	0.48	0.27	0.25
19		100.38	8.42	
20	0.05	0.06		
25	0.14	0.03	0.22	7.43
26	0.17	0.21	0.27	0.30
28	0.69	0.75		1.38
29		0.04		
32	0.43	0.69	4.52	0.14
34	51.28			
35	8.99	11.86	0.13	2.28
37	10.29	1.59	0.69	
39	34.15	0.41	0.29	
41	0.42	0.37	8.10	
43	7.59			
44	0.21	0.26	0.39	0.30
46	0.66	0.45	0.91	
48	0.19	1.42	2.51	
49	151.73	2.84	2.91	2.69
50			1.28	4.76
51	4.35	3.63		0.15
53		0.22	0.07	0.12
54	0.04	0.12	0.29	
55		0.85	0.35	
57	0.19	0.10	0.09	0.17
58	7.59			
63	3.73	0.22	38.57	23.78
66		10.75		
71	0.22	0.09		
79			0.08	0.11
97		1.32		
431		12.55	11.59	11.59

Description of Calculation

Total number of intrusion/burglary incidents, divided by total number of district sites.

Importance of Measure

This gives districts an idea of the density of incidents in each district, adjusted for the size of the district (by number of sites).

Factors that Influence

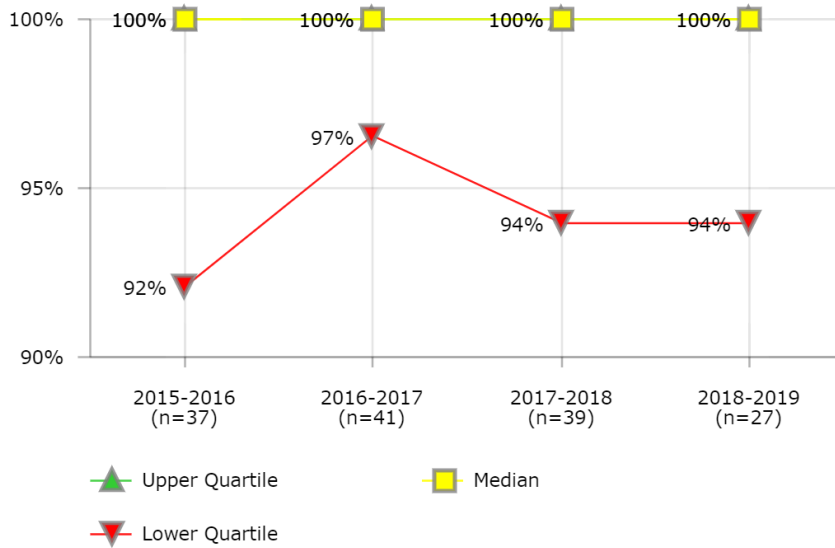
- Available resources to allocate for safety and security
- Staffing formulas
- Documented need for additional safety and security staff through data such as crime statistics
- Utilization of technology such as security cameras to offset the need for more staff
- Effectiveness of security alarm systems

Districts in Best Quartile (2018-2019)

- Clark County School District
- Jefferson County Public Schools (KY)
- Miami-Dade County Public Schools
- Oklahoma City Public Schools
- Toledo Public Schools
- Wichita Unified School District

SAFETY & SECURITY

Intrusion/Burglary Alarm Systems - Percent of Sites



Description of Calculation

Total number of sites with intrusion/burglary alarm systems, divided by the total number of district sites.

Importance of Measure

This measure is an indication of the number of schools that have an intrusion alarm system to safeguard district assets.

Factors that Influence

- Historical crime rates for physical property
- Reliability of alarm system
- Response time of monitors (if applicable)
- Configuration of the alarm system
- Budget allocation

District	2015-2016	2016-2017	2017-2018	2018-2019
1	102%	97%	94%	94%
3	100%	100%	100%	100%
4	100%	100%	100%	100%
5		103%	98%	
7	100%	100%	100%	100%
8	100%	100%	94%	100%
9	100%	100%	100%	
10	87%			
12		100%	100%	10%
14	108%	114%	114%	114%
16	92%	100%	100%	
18	76%	100%	75%	79%
19		86%	89%	
20	100%	100%	100%	
23			93%	
25	100%	75%	60%	79%
26	100%	100%	100%	100%
27				123%
28	80%	100%	100%	100%
30	100%	100%	100%	100%
32	100%	100%	100%	98%
35		131%	100%	100%
37	100%	100%	100%	
39	95%	95%	131%	
41	104%	100%	97%	
43	100%	100%		
44	84%	85%	85%	89%
46	100%	99%	34%	
47	100%	99%	100%	97%
48	98%	95%	96%	100%
49	92%	92%	92%	92%
50			108%	109%
51	79%	100%	100%	139%
52	100%		100%	100%
53		100%	100%	100%
54		80%	80%	
55	103%	113%	111%	
57	76%	76%	72%	73%
58	98%			
62	100%			
63	101%	100%	100%	114%
66	105%	100%		
67	100%			
71	17%	96%	103%	
74	100%	107%		
79		100%	98%	100%
91	90%	88%		
97		100%		
431		100%	100%	100%

Transportation

Performance metrics in transportation cover a broad range of factors that affect service levels and cost efficiency. The broad summative measures are **Cost per Total Mile Operated** and **Transportation Cost per Rider**, and other measures include diagnostic tools to weed out inefficiencies and excessive expenses. A key measure of efficiency is **Daily Runs per Bus**, which reflects the daily reuse of buses; and important service-level measures include **On-Time Performance** and **Turn Time to Place New Students**.

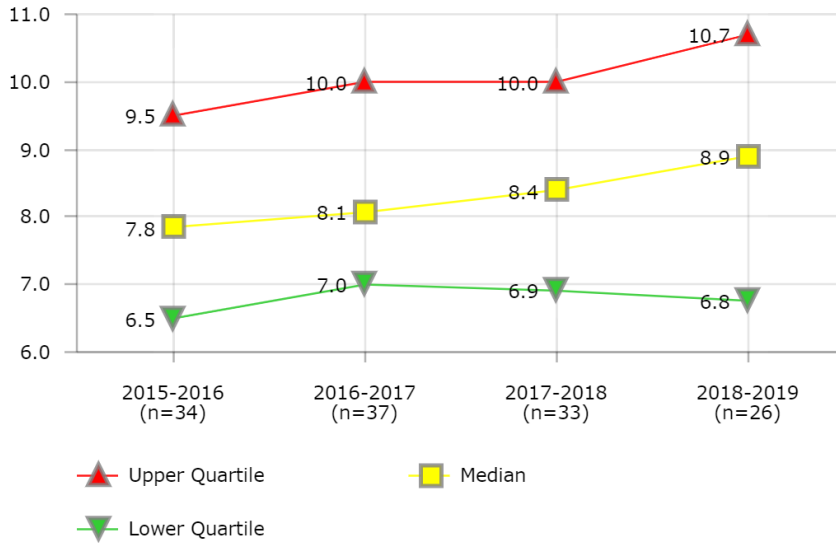
Careful consideration of each measure and its impact on a district's transportation services is vital to the improvement of performance.

General factors that influence transportation measures and improvement strategies include:

- Types of transported programs served
- Bell schedule
- Effectiveness of the routing plan
- Spare bus factor needed
- Age of fleet
- Driver wage and benefit structure and labor contracts
- Maximum riding time allowed and earliest pickup time allowed
- Enrollment projections and their impact on transported programs

TRANSPORTATION

Bus Fleet - Average Age of Fleet



Description of Calculation

Average age of bus fleet.

Importance of Measure

- Fleet replacement plans drive capital expenditures and on-going maintenance costs
- Younger fleets require greater capital expenditures but reduced maintenance costs
- A younger fleet will result in greater reliability and service levels.
- An older fleet requires more maintenance expenditure but reduces capital expenses.

Factors that Influence

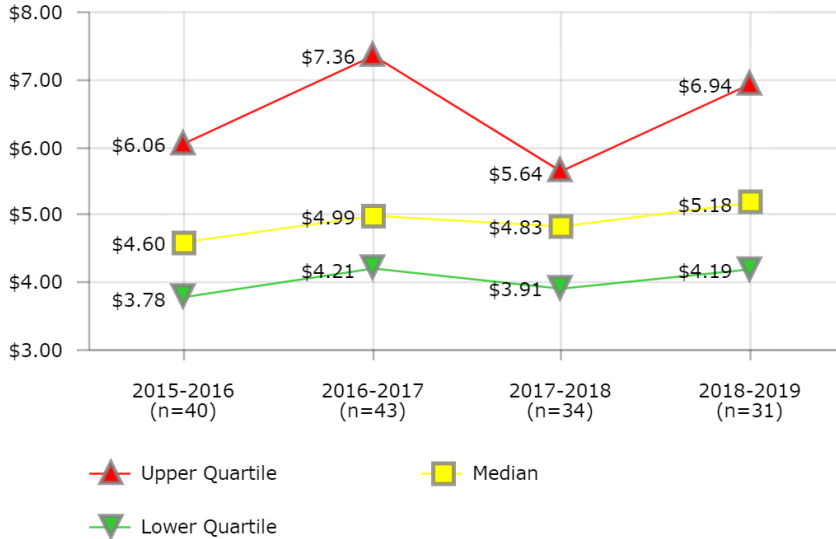
- Formal district-wide capital replacement budgets and standards
- Some districts may operate climates that reduce bus longevity
- Some districts may be required to purchase cleaner burning or expensive alternative-fueled buses
- Availability of state or local bond funding for school bus replacement

Districts in Best Quartile (2018-2019)

- Duval County Public Schools
- Fresno Unified School District
- Minneapolis Public Schools
- Oklahoma City Public Schools
- Orange County Public School District
- Palm Beach County School District
- St. Paul Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
2	12.3	13.5		
3	3.0	3.0	3.0	3.0
5		10.2	10.2	
7	12.4	13.4	10.4	11.9
8	8.2	7.0	7.0	6.8
9	7.0	7.5	7.0	7.0
10	10.3	8.5	8.0	8.0
11	13.4	12.7		11.2
12	7.0	8.1	9.8	8.5
13	10.8	8.9	10.2	10.6
14	5.7	10.0	11.0	11.0
16	14.8	16.0		
20	5.0	5.0		
25	8.0	8.4	9.0	10.0
26			6.0	
27			12.9	13.2
28	7.4	7.2	8.4	9.3
32	7.7	8.7	9.7	10.7
33		3.0		
35	7.4	8.4	10.9	10.0
37	11.0	11.1	11.0	
39	9.5	11.0	9.6	
44	5.4	5.3	4.4	3.5
46	2.4	2.4	3.4	
47	8.2	8.9	6.7	7.8
48	6.5	6.1	6.8	6.0
49	8.0	10.0		11.6
51	8.8	7.9	6.5	4.5
52		5.6		5.5
53	9.7	10.0	10.0	10.0
54		7.0	7.0	
55	7.6	8.0	8.2	
57	6.0	6.0	6.9	7.9
58	8.9			
62			16.0	
66	8.6	7.9	9.8	11.6
67	2.5			1.9
71	6.9	7.8	7.8	
76	9.5	9.8		8.0
79		8.0	8.0	10.2
91	7.3	7.5	9.8	
97		12.0	9.3	
431		6.3	6.5	

TRANSPORTATION
Cost per Mile Operated



District	2015-2016	2016-2017	2017-2018	2018-2019
1	\$5.75	\$5.57		
2	\$4.29	\$9.12		
3	\$4.89	\$4.99	\$4.82	\$5.62
4	\$3.23	\$3.13	\$3.05	\$3.16
5		\$4.77	\$2.72	
7	\$4.95	\$5.81	\$5.86	\$5.61
8	\$3.62	\$4.30	\$4.18	\$4.07
9	\$4.80	\$5.07	\$5.01	\$5.18
10	\$3.15	\$4.24	\$4.88	\$4.78
11	\$5.99	\$6.27		\$7.05
12	\$6.12			\$5.27
13	\$4.69	\$4.26	\$4.56	\$3.70
14	\$3.60	\$3.26	\$3.63	\$4.02
16	\$4.04	\$7.15		
18	\$11.93	\$4.21	\$4.91	\$5.03
20	\$5.61	\$5.54		
25			\$7.92	\$2.11
26		\$8.11	\$8.74	
27			\$5.51	\$5.70
28	\$7.47	\$7.88	\$5.59	\$6.98
30	\$4.80	\$4.69	\$4.74	\$5.04
32	\$7.12	\$4.88	\$4.58	\$5.00
33		\$12.02		
35	\$2.74		\$3.16	\$3.87
37	\$8.00	\$8.46		
39	\$3.42	\$5.16	\$4.84	
40		\$3.32		
41	\$4.10	\$4.57		
43	\$4.36	\$8.90		
44	\$3.27	\$3.44	\$3.91	\$4.85
45	\$7.80	\$7.36		
47		\$5.42	\$5.30	\$5.29
48	\$4.73	\$5.95	\$5.77	\$7.82
49	\$3.26	\$3.47		\$2.78
50			\$1.87	\$7.91
51	\$3.55	\$4.73	\$3.06	\$4.19
52	\$3.95			\$6.94
53		\$1.85	\$1.93	\$4.38
54	\$10.36	\$12.26		
55	\$3.22	\$3.34	\$3.59	
57	\$4.51	\$13.35	\$16.54	\$7.64
58	\$7.36			
62			\$5.75	
63	\$12.57	\$5.54	\$6.26	\$6.49
66	\$4.23	\$4.16	\$4.51	\$4.94
67	\$4.47			\$8.25
71	\$4.30	\$4.64	\$4.93	
74	\$6.25			
76	\$5.37	\$4.63		\$5.37
79		\$8.37	\$7.20	\$9.05
91	\$4.42	\$3.47	\$3.92	
97		\$3.08	\$4.01	
431		\$9.11	\$5.64	

Description of Calculation

Total direct cost plus total indirect cost plus total contractor cost of bus services, divided by total miles operated.

Importance of Measure

This is a basic measurement of the cost efficiency of a pupil transportation program. It allows a baseline comparison across districts that will inevitably lead to further analysis based on a district's placement. A greater than average cost per mile may be appropriate based on specific conditions or program requirements in a particular district. A less than average cost per mile may indicate a well-run program, or favorable conditions in a district.

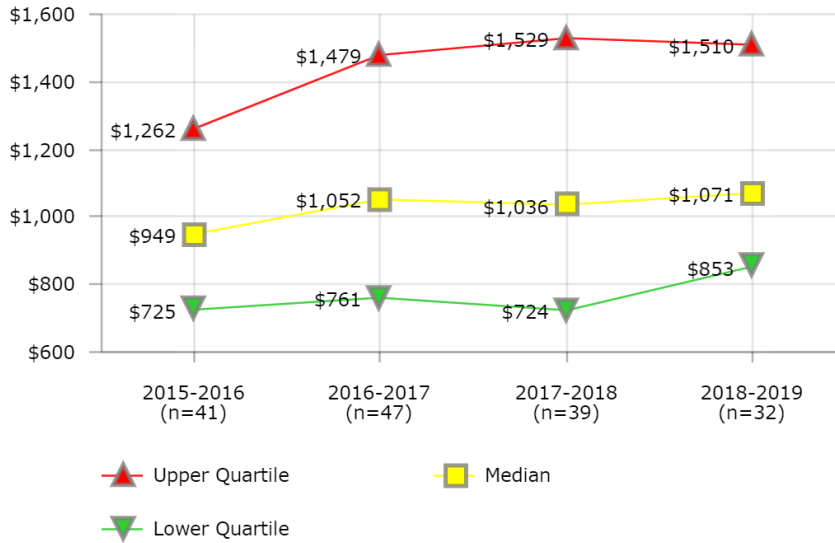
Factors that Influence

- Driver wage and benefit structure; labor contracts
- Cost of the fleet, including fleet replacement plan, facilities, fuel, insurance and maintenance also play a role in the basic cost
- Effectiveness of the routing plan
- Ability to use each bus for more than one route or run each morning and each afternoon
- Bell schedule
- Transportation department input in proposed bell schedule changes
- Maximum riding time allowed and earliest pickup time allowed
- Type of programs served will influence costs

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Broward County Public Schools
- Columbus Public Schools
- Guilford County School District
- Newark Public Schools
- Oklahoma City Public Schools
- Palm Beach County School District
- Wichita Unified School District

TRANSPORTATION
Cost per Rider



Description of Calculation

Total direct cost plus total indirect cost plus total contractor cost of bus services, divided by number of riders.

Importance of Measure

This is a basic measurement of the cost efficiency of a pupil transportation program. It allows a baseline comparison across districts that will inevitably lead to further analysis based on a district's placement.

Factors that Influence

- Driver wage and benefit structure; labor contracts
- Cost of the fleet, including fleet replacement plan, facilities, fuel, insurance and maintenance also play a role in the basic cost
- Effectiveness of the routing plan
- Ability to use each bus for more than one route or run each morning and each afternoon
- Bell schedule
- Transportation department input in proposed bell schedule changes
- Maximum riding time allowed and earliest pickup time allowed
- Type of programs served will influence costs

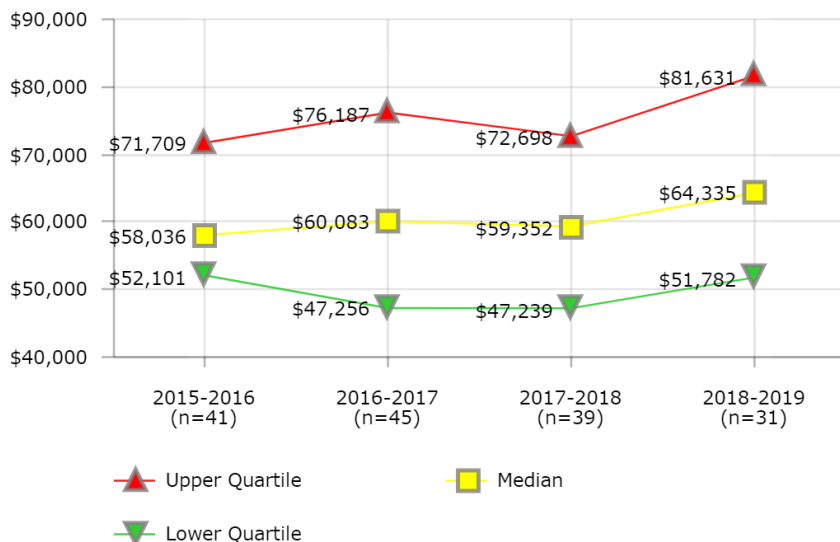
Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Anchorage School District
- Des Moines Public Schools
- Guilford County School District
- Hillsborough County Public Schools
- Jefferson County Public Schools (KY)
- Newark Public Schools
- Oklahoma City Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1	\$905	\$889		
2	\$840	\$1,501		
3	\$695	\$819	\$793	\$945
4	\$1,507	\$1,524	\$1,601	\$1,657
5		\$680	\$411	
7	\$689	\$727	\$724	\$757
8	\$792	\$840	\$840	\$872
9	\$846	\$901	\$893	\$906
10	\$604	\$774	\$852	\$834
11	\$2,641	\$2,578		\$3,071
12	\$725	\$598	\$406	\$638
13	\$630	\$690	\$775	\$890
14	\$474	\$439	\$449	\$495
16	\$2,436	\$4,140		
18	\$947	\$1,009	\$977	\$1,059
20	\$871	\$761		
23			\$894	
25	\$285	\$1,917	\$2,333	\$441
26			\$1,430	
27			\$1,036	\$1,083
28	\$1,082	\$1,214	\$720	\$918
30	\$1,166	\$1,214	\$1,189	\$1,245
32	\$1,600	\$1,042	\$1,061	\$1,037
33		\$1,420		
35	\$1,729	\$1,161	\$1,197	\$914
37	\$415	\$1,243	\$575	
39	\$1,479	\$1,901	\$1,982	
40		\$1,052		
41	\$614	\$682		
43	\$1,250	\$1,366	\$1,529	\$1,488
44	\$1,192	\$1,268	\$1,464	\$1,528
45	\$1,599	\$1,479		
46		\$3,072		
47	\$984	\$1,075	\$1,262	\$1,112
48	\$949	\$1,204	\$1,189	\$1,498
49	\$860	\$972		\$796
50		\$566	\$353	\$1,121
51	\$577	\$737	\$474	\$646
52	\$988			\$1,357
53		\$435	\$315	\$740
54	\$4,776	\$5,119	\$5,211	
55	\$458	\$496	\$530	
57	\$1,425	\$1,385	\$1,729	\$2,303
58	\$1,262			
62			\$4,015	
63	\$1,218	\$1,540	\$1,603	\$1,693
66	\$2,307	\$2,123	\$1,929	\$1,891
67				\$1,447
71	\$740	\$793	\$809	
74	\$735			
76	\$1,057	\$1,019		\$1,521
79		\$1,179	\$1,314	\$2,194
91	\$979	\$866	\$1,082	
97		\$712	\$752	
431		\$2,885	\$1,582	

TRANSPORTATION

Cost per Bus



District	2015-2016	2016-2017	2017-2018	2018-2019
1	\$61,212	\$62,492		
2	\$42,979	\$116,490		
3	\$71,784	\$85,147	\$82,499	\$96,172
4	\$51,028	\$48,753	\$53,179	\$41,331
5		\$44,351	\$25,455	
7	\$55,585	\$61,173	\$61,928	\$52,776
8	\$55,876	\$66,645	\$55,601	\$60,267
9	\$64,464	\$68,318	\$67,400	\$65,386
10	\$38,444		\$60,882	\$59,611
11	\$62,498	\$61,881		\$69,243
12	\$74,905	\$35,307	\$72,698	\$64,335
13	\$56,486	\$57,030	\$59,352	\$47,770
14	\$35,984	\$34,940	\$38,636	\$43,426
16	\$50,411	\$82,930		
18	\$68,959	\$67,628	\$76,707	\$86,498
20	\$62,396	\$70,751		
23			\$41,789	
25		\$32,099	\$25,760	\$7,860
26		\$106,344	\$112,050	
27			\$48,683	\$51,782
28	\$79,994	\$80,267	\$53,696	\$72,060
30	\$56,015	\$57,739	\$58,100	\$59,701
32	\$64,084	\$37,746	\$41,944	\$56,169
33		\$75,921		
35	\$54,677	\$58,055	\$59,384	\$65,106
37	\$73,018	\$77,139	\$32,411	
39	\$50,930	\$60,083	\$83,239	
40		\$42,002		
41	\$45,517	\$71,591		
43	\$45,200	\$44,774	\$45,377	\$43,003
44	\$58,684	\$58,953	\$67,206	\$72,619
45	\$83,859	\$78,896		
46		\$37,980	\$98,734	
47	\$76,096	\$58,707	\$65,103	\$72,798
48	\$74,180			
49	\$42,555	\$46,297		\$45,771
50			\$18,298	\$81,631
51	\$48,166	\$60,272	\$47,239	\$63,443
52	\$79,460			\$126,762
53		\$24,349	\$27,863	\$64,554
54	\$71,709	\$76,187	\$79,444	
55	\$52,394	\$54,322	\$57,229	
57	\$57,917	\$129,686	\$157,106	\$164,153
58	\$84,278			
62			\$60,147	
63	\$52,534	\$108,976	\$112,263	\$112,391
66	\$60,408	\$57,623	\$56,871	\$59,258
67	\$97,145			\$84,269
71	\$53,928	\$59,427	\$63,652	
74	\$52,101			
76	\$58,036	\$47,256		\$50,897
79		\$105,485	\$86,334	\$106,979
91	\$62,760	\$53,272	\$59,414	
97		\$46,867	\$58,040	
431		\$97,738	\$54,107	

Description of Calculation

Total direct transportation costs plus total indirect transportation costs, divided by total number of buses (contractor and district).

Importance of Measure

This is a basic measurement of the cost efficiency of a pupil transportation program.

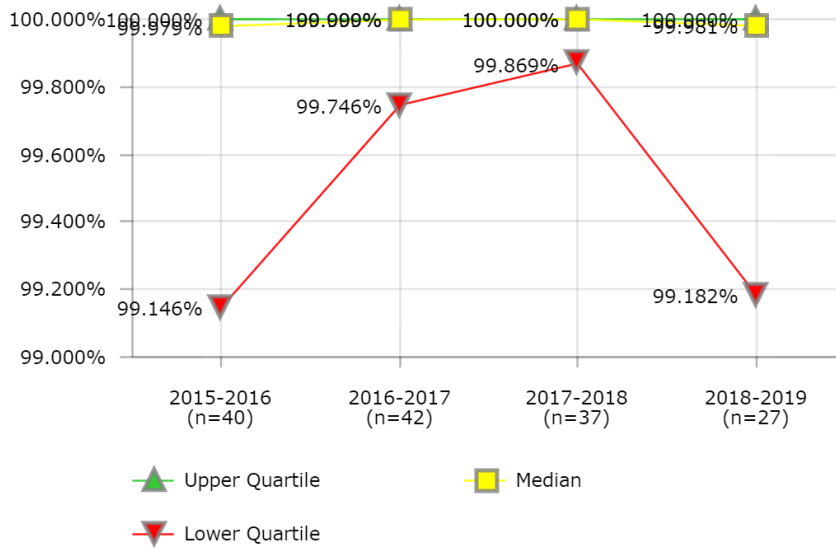
Factors that Influence

- Driver wage and benefit structure; labor contracts
- Cost of the fleet, including fleet replacement plan, facilities, fuel, insurance and maintenance also play a role in the basic cost
- Effectiveness of the routing plan
- Ability to use each bus for more than one route or run each morning and each afternoon
- Bell schedule
- Transportation department input in proposed bell schedule changes
- Maximum riding time allowed and earliest pickup time allowed
- Type of programs served will influence costs

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Broward County Public Schools
- Guilford County School District
- Newark Public Schools
- Norfolk School District
- Pittsburgh Public Schools
- San Antonio Independent School District
- Wichita Unified School District

TRANSPORTATION
On-Time Performance



Description of Calculation

One, minus: the sum of bus runs that arrived late (contractor and district), divided by the total number of bus runs (contractor and district) over two.

Importance of Measure

- This measure refers to the level of success of the transportation service remaining on the published arrival schedule.
- Late arrival of students at schools causes disruption in classrooms and may preclude some students from having school-provided breakfast.

Factors that Influence

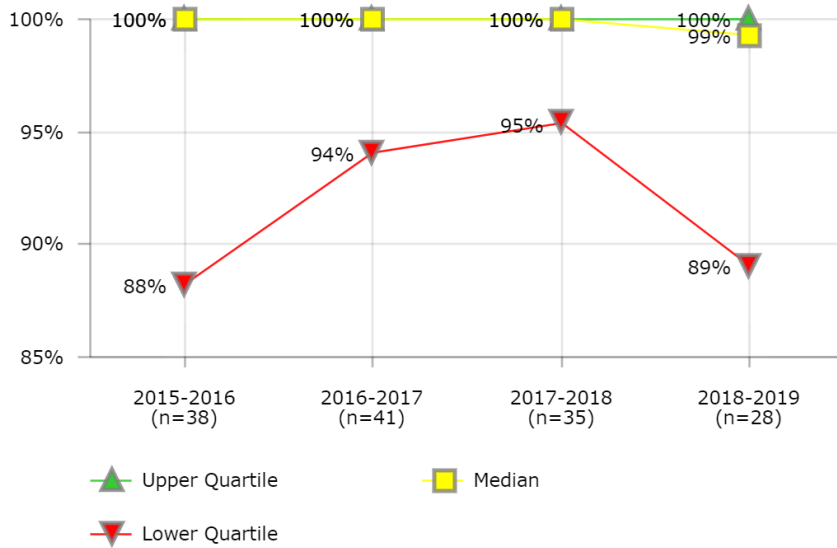
- Automobile traffic
- Accident
- Detour
- Weather
- Increased ridership
- Mechanical breakdown
- Unrealistic scheduling

Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Broward County Public Schools
- Cincinnati Public Schools
- Clark County School District
- Cleveland Metropolitan School District
- Columbus Public Schools
- Des Moines Public Schools
- Detroit Public Schools
- Jefferson County Public Schools (KY)
- Miami-Dade County Public Schools
- Norfolk School District
- Pittsburgh Public Schools
- Shelby County Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
2	100.000%	100.000%		
3	99.042%	99.069%	98.860%	98.827%
4	96.558%	97.182%	96.281%	96.811%
5			100.000%	
7	99.244%	99.452%	99.229%	99.215%
8	100.000%	99.990%	97.980%	99.182%
9	100.000%	100.000%	100.000%	100.000%
10	100.000%	100.000%	100.000%	
11	96.861%			98.882%
12	100.000%	100.000%	100.000%	100.000%
13	100.000%		100.000%	100.000%
14	100.000%	99.865%	99.869%	99.842%
16	99.048%			
18		100.000%	100.000%	100.000%
20	99.995%	99.998%		100.000%
23			100.000%	
25	99.417%	99.746%	100.000%	99.786%
26		100.000%		
27			100.000%	100.000%
28	100.000%	95.421%	100.000%	100.000%
30	99.865%	99.804%	99.798%	99.744%
32	100.000%	99.988%	99.993%	100.000%
34	99.628%			
35	99.793%	99.781%	100.000%	100.000%
37	99.918%	99.917%	99.999%	
39	95.609%	95.939%	100.000%	
40		100.000%		
41	100.000%	100.000%		
43	100.000%	100.000%	100.000%	100.000%
44	97.082%	97.710%	98.041%	98.379%
45		100.000%		
46	100.000%	100.000%	100.000%	
47		100.000%	100.000%	
48	99.963%	99.982%	99.981%	99.981%
49	100.000%	100.000%		
50		100.000%	100.000%	100.000%
51	89.455%	84.008%	85.632%	88.032%
52	57.383%			
53	100.000%	100.000%	100.000%	100.000%
54	90.694%	99.948%	99.945%	
55	98.000%	98.000%	97.977%	
57	100.000%	100.000%	100.000%	100.000%
58	100.000%			
63	100.000%	100.000%	100.000%	
66	100.000%	100.000%		
67	99.887%			99.821%
71	99.708%	99.710%	100.000%	
74	99.354%			
76		93.805%		93.764%
79		100.000%	100.000%	99.972%
91	100.000%	100.000%	98.226%	
97		99.967%	100.000%	
431		100.000%	100.000%	

TRANSPORTATION
Bus Equipment - GPS Tracking



District	2015-2016	2016-2017	2017-2018	2018-2019
1	100%	100%		
2	66%	100%		
3	100%	100%	100%	100%
4	96%	100%	100%	74%
5		95%	95%	
7	98%	100%	100%	79%
8	98%	94%	94%	98%
9	100%	100%	100%	98%
10	100%	100%	100%	100%
11		96%		92%
12	88%	47%	100%	100%
13	100%	100%	100%	79%
14	35%	95%	100%	100%
16	90%	81%		
18	100%	91%	100%	100%
20	88%	104%		
23			87%	
25				67%
26		100%		
28	100%	100%	100%	100%
30	100%	100%	100%	100%
32	32%	55%	61%	94%
33		103%		
34	100%			
35	100%			
37		116%	48%	
39	101%	93%	119%	
40		86%		
41	100%			
43	48%	54%	53%	51%
44	100%	99%	100%	100%
45	100%	100%		
46			98%	
47	100%	100%	100%	105%
48	99%	94%	98%	99%
49	23%	60%		91%
50		92%	90%	100%
51	82%			
52	100%			46%
53		80%	92%	98%
54	100%	100%	100%	
55	100%	100%	100%	
57	92%	97%	97%	87%
58	85%			
62			100%	
63	71%		109%	109%
66		100%	99%	100%
71	98%	100%	100%	
74	100%			
76	88%	97%		100%
79		97%	86%	106%
91	100%	100%	100%	
97		100%	99%	
431			104%	

Description of Calculation

Number of buses with GPS tracking, divided by total number of buses.

Importance of Measure

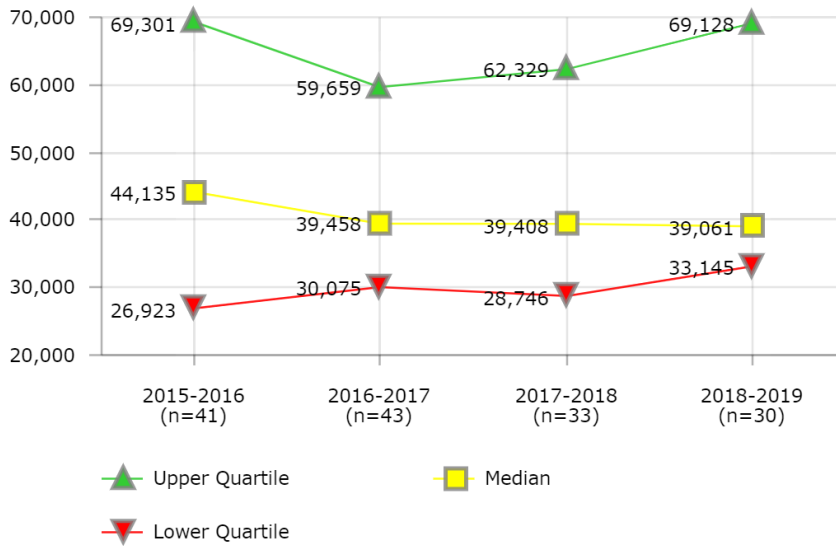
GPS tracking greatly expands the capacity for routing management and reporting.

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Atlanta Public Schools
- Des Moines Public Schools
- Detroit Public Schools
- Hillsborough County Public Schools
- Metropolitan Nashville Public Schools
- Milwaukee Public Schools
- Omaha Public School District
- San Antonio Independent School District
- Shelby County Schools
- St. Louis City Public School District
- St. Paul Public Schools
- Toledo Public Schools

TRANSPORTATION

Accidents - Miles Between Accidents



Description of Calculation

Total number of transportation accidents (contractor and district), divided by total number of miles driven (contractor and district).

Importance of Measure

Whether a district provides internal service or contracts for its service, student safety is a primary concern for every student transportation organization.

Tracking accidents by type allows for trending and designing specific training programs to reduce/prevent trends noted

Accident awareness and prevention can reduce liability exposure to a district

Factors that Influence

- Definition of accident and injury as defined by the survey vs. district definition
- Preventive accident training programs
- Experience of driving force

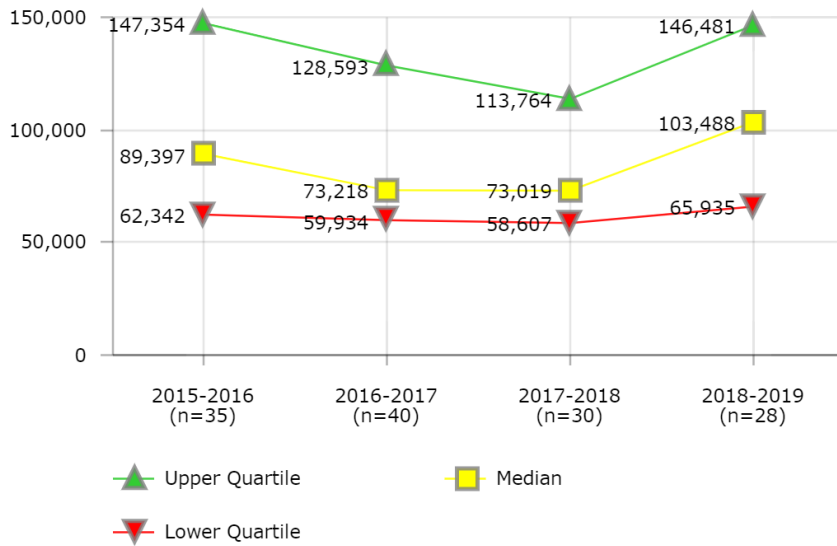
Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Fresno Unified School District
- Newark Public Schools
- Oklahoma City Public Schools
- Orange County Public School District
- San Antonio Independent School District
- St. Paul Public Schools
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1	20,606	39,510		
2	77,654	67,947		
3	71,847	97,774	94,189	75,990
4	106,963	82,937	87,846	142,822
5		15,080	15,998	
7	35,280	28,722	28,300	20,332
8	68,615	45,049	33,478	37,791
9	44,417	40,625	28,746	36,040
10	38,428	39,044	38,929	38,929
11	25,784	33,041		32,745
12	47,555			25,527
13	24,612	30,075	28,972	32,920
14	67,736	51,726	77,543	69,128
16	49,218	49,553		
18	18,027	58,216	52,190	43,009
20	83,491	130,245		30,706
25	9,099	19,867	45,062	336,018
27			33,501	37,457
28	26,923	45,332	41,556	34,631
30	51,283	59,659	51,763	47,839
32	23,256	23,064	25,973	26,902
33		17,117		
34	69,301			
35	34,449		25,888	21,342
37	15,230	20,198		
39	78,902	38,600	44,733	
40		39,458		
41	24,526	27,441		
43	68,498	44,953		
44	98,156	78,789	91,621	39,193
45	43,941	34,668		
47		21,722	29,440	57,610
48	100,280	119,677	147,415	114,248
49	72,509	78,723		56,131
51	184,201	115,206	105,509	96,793
52	76,996			
53		37,425	31,927	34,332
54	18,546	17,155	20,200	
55	37,004	38,960	40,499	
57	59,882	34,684	25,743	54,196
58	40,080			
62			100,951	
63	29,663	102,466	91,720	63,711
66	44,135	32,922	54,027	33,145
67				195,323
71	45,016	31,719	30,328	
74	26,225			
76	39,764	40,202		86,045
79		25,195	20,131	35,683
91	36,587	36,683	39,408	
97		45,968	62,329	
431		134,093	25,398	

TRANSPORTATION

Accidents - Miles Between Preventable Accidents



District	2015-2016	2016-2017	2017-2018	2018-2019
1	59,464	69,613		
2	172,956	114,054		
3		3,031,000		1,013,200
4	248,531	169,404	198,165	238,037
5		30,303	35,687	
7	61,741	58,509	47,307	33,952
8	133,765	82,640	113,764	112,069
9	84,375	72,562	68,230	64,633
10	89,397	90,212	79,347	79,347
11	95,785	113,096		107,724
12	69,350			37,711
13	72,996	83,977	89,843	111,525
14	129,314	71,123	171,128	126,159
16	108,447	103,611		
18	34,051	127,580	104,381	99,252
20	535,730	752,524		67,236
27			57,149	73,978
28	66,667	78,301	89,576	71,609
32	48,458	48,058	43,259	39,961
33		55,000		
34	126,372			
35	52,974		61,414	41,636
37	41,573	37,839		
39	161,749	61,360	78,176	
40		67,287		
41	52,228	42,651		
44	194,107	237,417	217,177	153,207
45	84,181	70,573		
47		51,301	69,802	174,006
48	166,820	247,440	235,504	209,897
49	133,381	129,605		130,278
51	429,803	219,938	161,781	151,239
52	147,354			
53		71,285	64,220	62,423
54	85,000	73,874	74,312	
55	62,342	65,860	67,222	
57	185,089	66,216	58,607	83,579
62			245,166	
63		678,839	105,380	93,693
66	75,564	51,589	71,726	61,709
67				390,646
71	110,631	63,133	59,226	
74	88,510			
76	124,480	132,093		141,722
79		35,855	31,455	118,943
91	55,086	54,290	52,800	
97		102,039	131,884	
431		134,093	47,167	

Description of Calculation

Total number of transportation accidents (contractor and district) that were preventable, divided by total number of miles driven (contractor and district).

Importance of Measure

Whether a district provides internal service or contracts for its service, student safety is a primary concern for every student transportation organization.

Tracking accidents by type allows for trending and designing specific training programs to reduce/prevent trends noted

Accident awareness and prevention can reduce liability exposure to a district

Factors that Influence

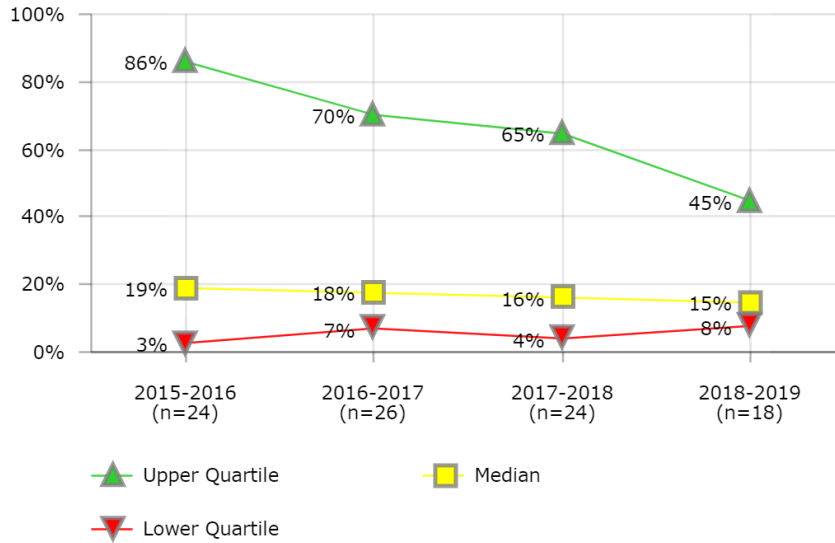
- Definition of accident and injury as defined by the survey vs. district definition
- Preventive accident training programs
- Experience of driving force

Districts in Best Quartile (2018-2019)

- Duval County Public Schools
- Fresno Unified School District
- Metropolitan Nashville Public Schools
- Oklahoma City Public Schools
- Orange County Public School District
- St. Paul Public Schools
- Wichita Unified School District

TRANSPORTATION

Bus Fleet - Alternately-Fueled Buses



Description of Calculation

Number of alternatively-fueled buses, divided by total number of buses.

Importance of Measure

Bus fleets using alternative fuels tend to be more eco-friendly, and depending on fuel prices they can be a cheaper alternative.

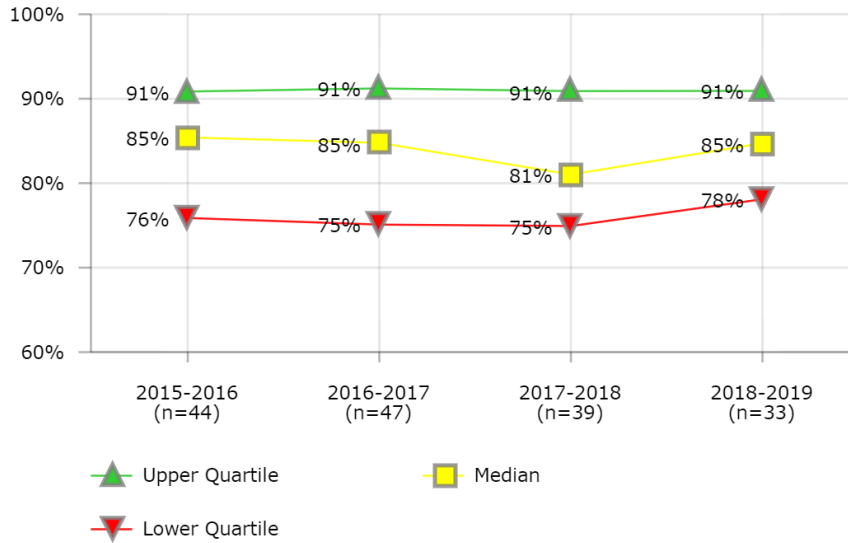
Districts in Best Quartile (2018-2019)

- Clark County School District
- Detroit Public Schools
- Jefferson County Public Schools (KY)
- Los Angeles Unified School District
- Orange County Public School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1	31%	31%		
3	7%	7%	11%	14%
5		85%	85%	
9	100%	100%	100%	98%
10	4%	7%	8%	8%
11	67%	68%		77%
13	11%	14%	17%	13%
16	100%	100%		
20	24%	32%		3%
23			11%	
26			40%	
33		19%		
35	1%	1%	1%	1%
39	101%	12%	17%	
40		12%		
41	100%	16%		
44	2%	1%	3%	2%
47	0%		0%	0%
48	100%	100%	100%	100%
49	72%	70%		
50			38%	45%
51	2%			
52	3%			37%
53		100%	98%	98%
54	5%	4%	5%	
55	0%	0%	0%	
57	15%	16%	17%	15%
62			9%	
66	55%	52%	57%	37%
67	23%			30%
71	1%	1%	1%	
76				9%
79			1%	8%
91	100%	100%	100%	
97		16%	16%	
431		62%	73%	

TRANSPORTATION

Bus Fleet - Daily Buses as Percent of Total Buses



District	2015-2016	2016-2017	2017-2018	2018-2019
1	90%	90%		
2	52%	72%		
3	85%	85%	85%	85%
4	87%	86%	90%	87%
5		92%	95%	
7	78%	79%	79%	82%
8	76%	81%	78%	82%
9	93%	82%	82%	76%
10	69%	71%	75%	75%
11	89%	91%		86%
12	75%	89%	76%	72%
13	80%	77%	77%	80%
14	91%	76%	87%	87%
16	59%	59%		
18	91%	91%	91%	91%
20	98%	97%		98%
23			78%	
25	94%	93%		97%
26			100%	
27			64%	60%
28	81%	72%	70%	74%
30	91%	91%	91%	91%
32	74%	61%	67%	78%
33		74%		
34	91%			
35	87%	100%	96%	100%
37	82%	79%	81%	
39	91%	93%	100%	
40		86%		
41	80%	96%		
43	100%	100%	100%	100%
44	88%	87%	87%	88%
45	91%	91%		
46	96%	91%	99%	
47	69%	51%	63%	69%
48	79%	75%	76%	81%
49	81%	79%		85%
50		90%	91%	91%
51	71%	59%	71%	75%
52	88%			99%
53		72%	78%	78%
54	86%	91%	89%	
55	89%	88%	87%	
57	76%	77%	81%	85%
58	86%			
62			68%	
63	94%	100%	100%	100%
66	94%	92%	83%	85%
67	82%			81%
71	68%	75%	72%	
74	84%			
76	70%	100%		63%
79		83%	85%	85%
91	74%	76%	75%	
97		72%	73%	
431		84%	63%	

Description of Calculation

Number of daily buses, divided by total number of buses.

Importance of Measure

A goal of a well-run transportation department is to procure only the number of buses actually needed on a daily basis, plus an appropriate spare bus ratio.

Maintaining or contracting unneeded buses is expensive and unnecessary as these funds could be used in the classroom.

Factors that Influence

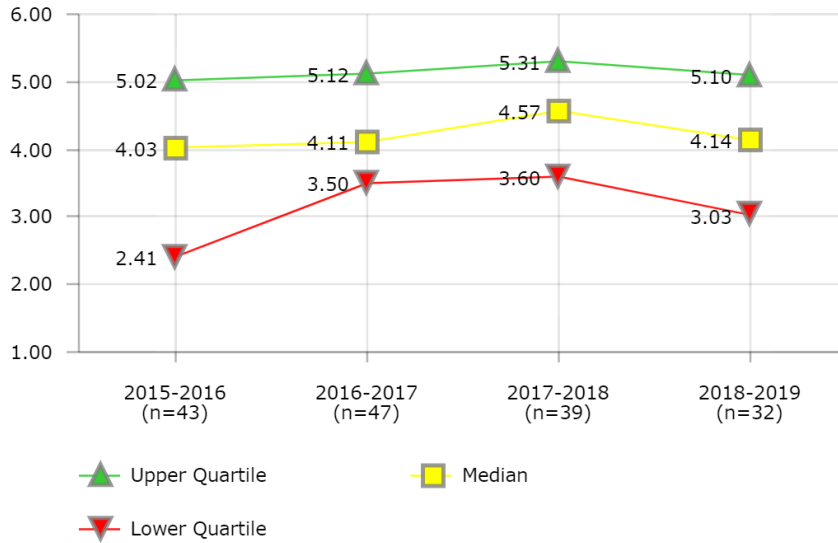
- Historical trends of the number of students transported
- Enrollment projections and their impact on transported programs
- Changes in transportation eligibility policies
- Spare bus factor needed
- Age of fleet

Districts in Best Quartile (2018-2019)

- Cincinnati Public Schools
- Columbus Public Schools
- Detroit Public Schools
- Milwaukee Public Schools
- Minneapolis Public Schools
- Newark Public Schools
- Pittsburgh Public Schools
- Shelby County Schools
- St. Louis City Public School District

TRANSPORTATION

Bus Usage - Daily Runs per Bus



Description of Calculation

Total number of daily bus runs, divided by the total number of buses used for daily yellow bus service (contractor and district).

Importance of Measure

- There is a positive correlation between the number of daily runs a bus makes and operating costs.
- Efficiencies are gained when one bus is used multiple times in the morning and again in the afternoon.
- Using one bus to do the work of two buses saves dollars.

Factors that Influence

- District-managed or contractor transportation
- Tiered school bell times
- Transportation department input in proposed bell schedule changes
- Bus capacities
- District guidelines on maximum ride time
- District geography
- Minimum/shortened/staff development day scheduling
- Effectiveness of the routing plan
- Types of transported programs served

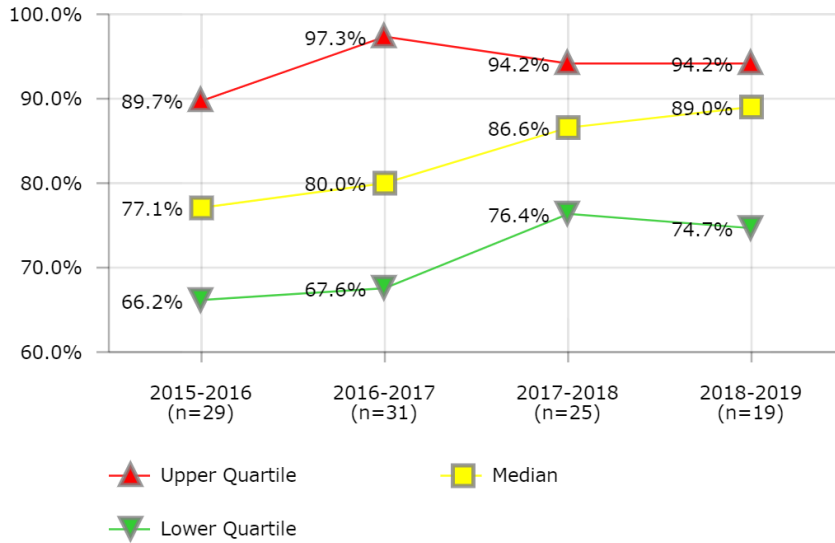
Districts in Best Quartile (2018-2019)

- Anchorage School District
- Cleveland Metropolitan School District
- Des Moines Public Schools
- Hillsborough County Public Schools
- Norfolk School District
- Orange County Public School District
- St. Louis City Public School District
- St. Paul Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1	4.25	4.21		
2		8.49		
3	5.35	5.47	5.85	6.02
4	5.02	4.88	4.77	4.79
5		3.50	3.28	
7	5.87	6.04	6.08	6.32
8	7.05	5.67	4.95	4.88
9	4.47	5.11	4.75	4.96
10	5.17	5.02	5.10	5.10
11	2.41			2.21
12	5.54	15.59	7.07	6.28
13	5.11	5.38	5.20	4.22
14	4.19	3.72	3.60	3.95
16	5.52	5.51		
18	4.46	5.11	5.05	4.99
20	4.11	3.76		1.03
23			3.81	
25	1.00	1.03		1.41
26		4.68	4.78	
27			4.74	5.57
28	4.34	5.12	4.41	5.10
30	3.80	3.77	3.74	3.76
32	8.20	7.98	7.44	1.60
33		3.86		
34	2.13			
35	3.97	3.69	4.07	3.96
37	3.57	3.73	3.88	
39	2.54	1.99	2.00	
40		3.74		
41	3.37	2.38		
43	1.44	1.44	2.47	1.52
44	4.21	4.11	4.21	4.09
45	3.60	3.58		
46	2.31	1.31	1.16	
47	4.14	6.06	5.46	3.59
48	6.32	6.38	6.77	6.69
49	4.72	4.70		4.17
50		3.50	3.45	3.70
51	2.13	2.46	2.46	2.46
52	1.04			
53		2.33	2.21	2.22
54	3.13	3.09	3.20	
55	5.45	5.35	5.31	
57	1.78	3.98	7.28	6.31
58	1.14			
62			4.45	
63	2.87	2.89	5.55	5.47
66	4.03	4.01	4.25	4.11
67	1.00			1.00
71	4.59	4.16	4.57	
74	3.45			
76	3.39	2.30		4.00
79		5.10	4.58	4.91
91	2.03	4.80	5.84	
97		5.00	4.57	
431		2.40	2.81	

TRANSPORTATION

Fuel Cost as Percent of Retail - Diesel



District	2015-2016	2016-2017	2017-2018	2018-2019
1	79.7%	63.7%		
3	89.7%	90.8%	90.7%	91.4%
4	73.3%	74.7%	77.7%	89.0%
7	77.1%	76.4%	77.3%	74.7%
8	79.6%	79.4%	63.1%	66.3%
10	67.7%		76.4%	83.3%
11	66.2%			
12	100.0%	100.0%		
13				82.0%
14	97.8%	97.3%	97.3%	99.7%
18	69.4%	80.0%	73.0%	73.7%
20	59.7%	59.3%		
25	100.0%	100.0%		
26		100.0%	100.0%	
27			100.0%	
28	65.8%		77.0%	
32		70.9%	94.2%	93.6%
33		100.0%		
35	66.1%	62.7%	76.9%	100.0%
37	86.7%	66.3%	98.6%	
44	92.6%	93.1%	93.8%	94.2%
45	54.3%	58.4%		
46	75.6%	75.6%	75.6%	
47	100.0%	100.0%	86.4%	86.4%
48	82.9%	93.0%	94.0%	94.7%
49	63.6%	66.4%		77.2%
51	90.6%	89.9%	90.3%	90.9%
55	56.2%	63.7%	67.8%	
57	100.0%	100.0%	100.0%	100.0%
66	71.1%	67.6%	74.8%	72.1%
67	61.1%			89.9%
71	86.3%	72.8%	68.9%	
76	74.7%	85.1%		
79		79.5%		73.2%
91	84.5%	86.1%	86.6%	
97		91.6%	90.9%	
431		100.0%	100.0%	

Description of Calculation

Per-gallon price paid by the district for diesel, divided by the per-gallon price of diesel at retail.

Importance of Measure

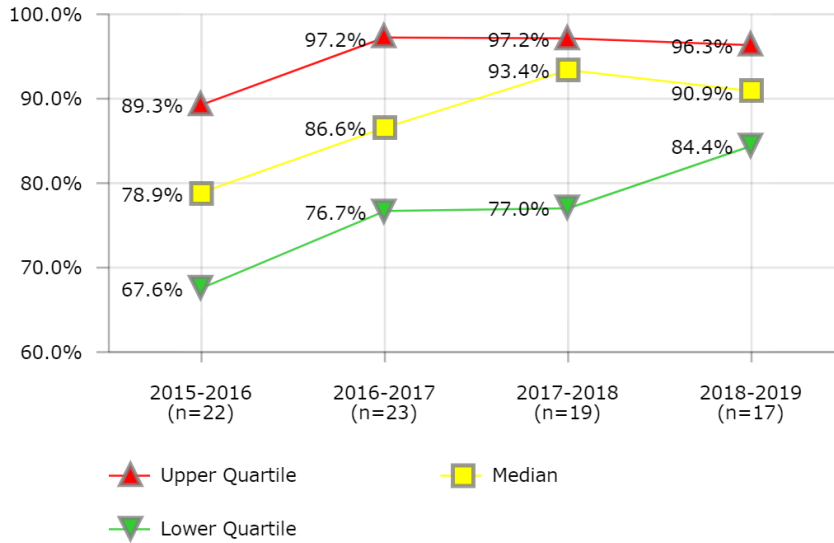
Fuel discounts reflect the degree to which the district leverages its considerable buying power when negotiating fuel procurements.

Districts in Best Quartile (2018-2019)

- Anchorage School District
- Omaha Public School District
- Palm Beach County School District
- Shelby County Schools
- Toledo Public Schools

TRANSPORTATION

Fuel Cost as Percent of Retail - Gasoline



Description of Calculation

Per-gallon price paid by the district for gasoline, divided by the per-gallon price of gasoline at retail.

Importance of Measure

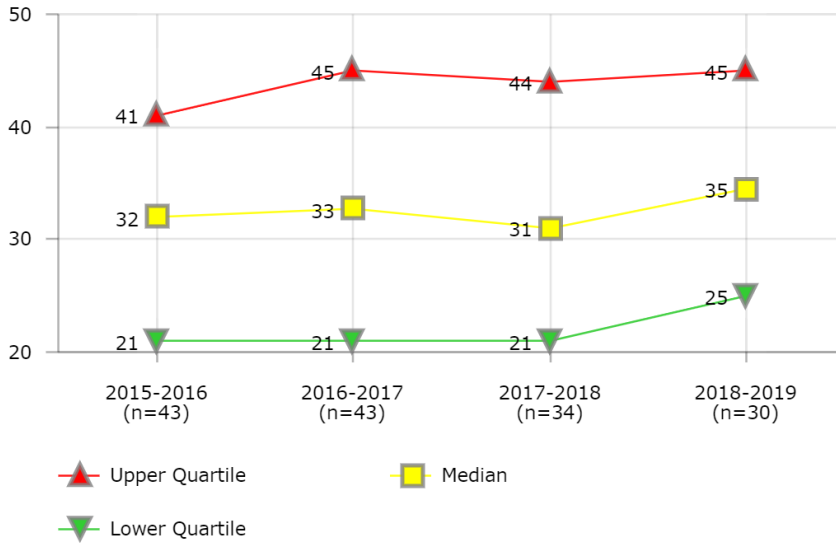
Fuel discounts reflect the degree to which the district leverages its considerable buying power when negotiating fuel procurements.

Districts in Best Quartile (2018-2019)

- Anchorage School District
- Broward County Public Schools
- Clark County School District
- Minneapolis Public Schools
- Palm Beach County School District

District	2015-2016	2016-2017	2017-2018	2018-2019
5		100.0%	100.0%	
7	95.8%	86.6%	83.8%	82.6%
8	78.2%	81.4%	67.4%	70.0%
9	75.1%	89.9%	77.0%	84.4%
10	98.3%		84.3%	95.2%
11	77.1%			85.5%
13				83.1%
14		97.2%	97.0%	97.8%
16	87.5%	87.9%		
25	100.0%	100.0%	100.0%	141.7%
28	58.6%		76.9%	
32		71.1%	93.6%	93.3%
33		100.0%		
35	78.4%	77.1%		
37	61.5%	68.9%		
45	67.4%	69.2%		
47	100.0%	100.0%	77.8%	85.0%
48	79.4%	84.9%	93.4%	93.5%
49	67.6%	71.7%		122.3%
51	89.3%	89.5%	90.2%	90.9%
52	80.4%			70.2%
53		83.3%	125.8%	163.6%
55	62.9%	65.1%	68.2%	
66	64.1%	87.4%	97.2%	96.3%
67	70.8%			90.0%
71	84.3%	78.9%	75.8%	
76	100.0%	76.7%		
91	87.7%	90.8%	96.5%	
97			93.6%	
431		100.0%	100.0%	

TRANSPORTATION
Daily Ride Time - General Education



District	2015-2016	2016-2017	2017-2018	2018-2019
1	15	17		
2	34	40		
3	20	20	20	20
4	21	21	21	22
5			15	
7	22	22	25	35
8	60	60		
9	36	22	30	23
10	25	25	25	25
11	41	43		49
12	18			30
13		20	25	22
14	15	15	15	15
16	34	32		
18	45	45	45	45
20	41	41		53
25	20			40
26			25	
28	30	40	40	40
30	51	51	49	49
32				30
33		60		
34	27			
35	47	49	45	45
37	40	40	40	
39	45	45	90	
40		60		
41	20	20		
43	40	40	40	40
44	27	27	38	38
45	40	42		
46	51	51	46	
47	35	30	30	30
48	29	14	15	15
49	24	24		50
50		13	14	16
51	27	32	30	30
52	18			
53	28	28	24	26
54	39	40	41	
55	15	16	16	
57	45	45	55	55
58	32			
62			60	
63	35	35	35	35
66	30	32	33	34
67	45			60
71	19	19	19	
74	45			
76	19	53		45
79		15	15	27
91	34	33	32	
97		62	66	
431		44	44	

Description of Calculation

Average one-way (single trip) daily ride time, in minutes - General Education

Importance of Measure

Cost efficiency must be balanced with service considerations. Districts certainly wish to maximize the loading of their buses but hopefully not at the expense of an overly long bus ride for the students.

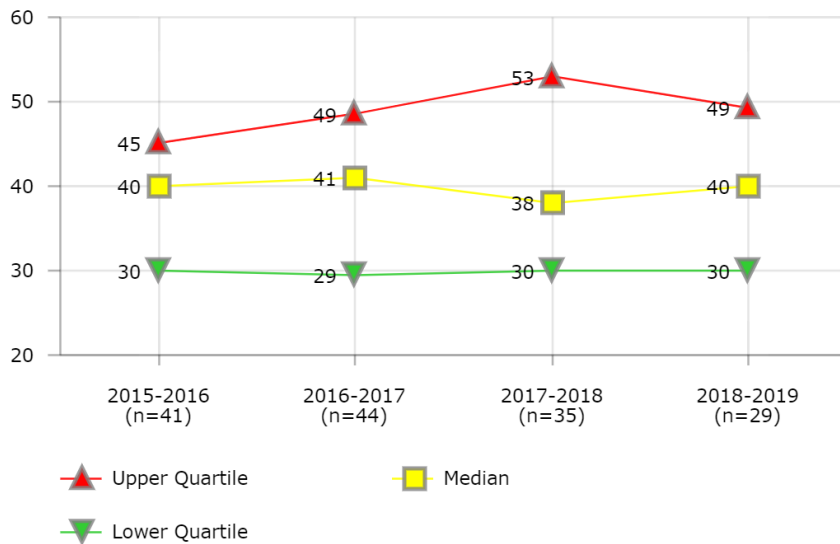
Factors that Influence

- Bus capacities
- State or district or state guidelines on maximum ride time and earliest pick up time
- District geography, attendance boundaries and zones

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Broward County Public Schools
- Clark County School District
- Detroit Public Schools
- Hillsborough County Public Schools
- Orange County Public School District
- St. Paul Public Schools
- Wichita Unified School District

TRANSPORTATION
Daily Ride Time - SWD



Description of Calculation

Average one-way (single trip) daily ride time, in minutes - Students with Disabilities

Importance of Measure

Cost efficiency must be balanced with service considerations. Districts certainly wish to maximize the loading of their buses but not at the expense of an overly long bus ride for the students.

Factors that Influence

- Bus capacities
- State or district or state guidelines on maximum ride time and earliest pick up time
- District geography, attendance boundaries and zones
- Programs transported

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Broward County Public Schools
- Clark County School District
- Detroit Public Schools
- Guilford County School District
- Hillsborough County Public Schools
- Metropolitan Nashville Public Schools
- Miami-Dade County Public Schools
- Orange County Public School District
- St. Paul Public Schools
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1	20	21		
2	16	20		
3	25	25	25	25
4	21	21	21	22
5		19	20	
7	34	34	35	60
8	60	60		
9	34	38	27	19
10	30	30	30	30
11	38	38		37
12	25			45
13		26	32	24
14	30	30	30	30
16	30	47		
18	60	60	60	60
20	46	46		
25	30	33	35	40
26			27	
28	40	40	40	40
30	52	53	52	51
32				30
33		60		
34	45			
35			60	60
37	40	45	45	
39	45	45	90	
40		60		
41	45	45		
43	50	50	50	50
44	50	50	69	61
45	42	42		
46	45	45	39	
47	35	30	30	30
48	61	29	30	29
49	20	20		30
50		28	30	27
51	44	45	45	45
52	21			
53		36	36	33
54	38	38	38	
55	36	36	36	
57	55	55	55	45
58	39			
62			60	
63	45	45	45	45
66	45	49	49	49
67	60			60
71	25	23	23	
74	56			
76	42	48		40
79		20	20	40
91	43	43	53	
97		75	82	
431		58	58	

Human Resources

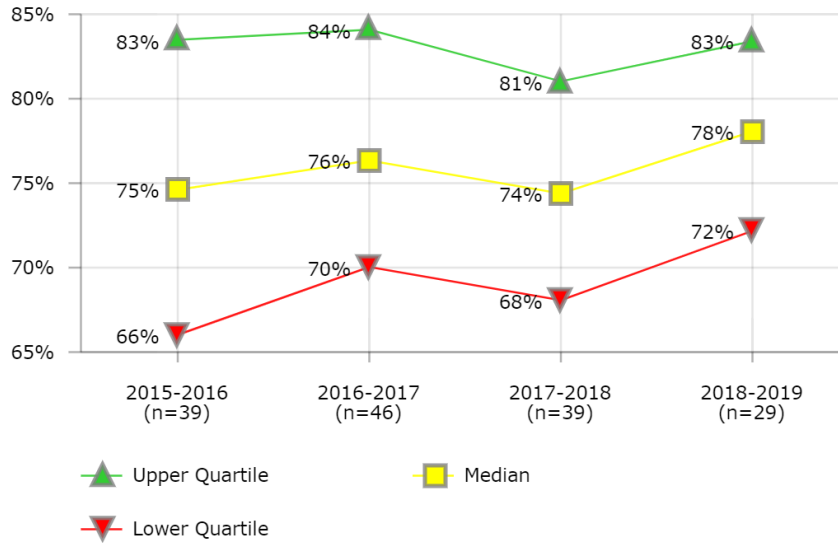
The measures in this section include such districtwide indicators as **Teacher Retention Rate** and **Employee Separation Rate**, as well as indicators that are focused more narrowly on the operation of the district's human resources department, such as **HR Cost per District FTE**, **HR Cost per \$100k Revenue**, **Exit Interview Completion Rate**, and **Substitute Placement Rate**. In addition, there are several measures that can be used to benchmark a district's health benefits and retirement benefits, including **Health Benefits Enrollment Rate** and **Health Benefits Cost per Enrolled Employee**.

The factors that influence these measures and that can guide improvement strategies may include:

- Identification of positions to be filled
- Diverse pool of qualified applicants
- Use of technology for application-approval process
- Site-based hiring vs. central-office hiring process
- Availability of interview team members
- Effectiveness of recruiting efforts
- Salary and benefits offered
- Employee satisfaction and workplace environment
- Availability of skills in local labor market
- Personnel policies and practices

HUMAN RESOURCES

Teacher Retention - Remaining After 1 Year



Description of Calculation

Number of teachers retained after one year, divided by number of teachers that were newly hired one years ago.

Importance of Measure

Based on review of this measure, a district may re-allocate funds to adopt new mentor/induction programs or revise their current programs. Districts will also have data available to justify making changes in their selection process and engaging local universities regarding coursework designed to better prepare graduates for urban teaching. By tracking, monitoring and examining retention of first year teachers, districts can measure early attrition rates and thereby manage the cost of bringing in new teachers, revised mentoring/induction program and maintain desired staff continuity.

Factors that Influence

- Culture
- Communication
- School leadership
- Professional development
- Selection and hiring process
- Support

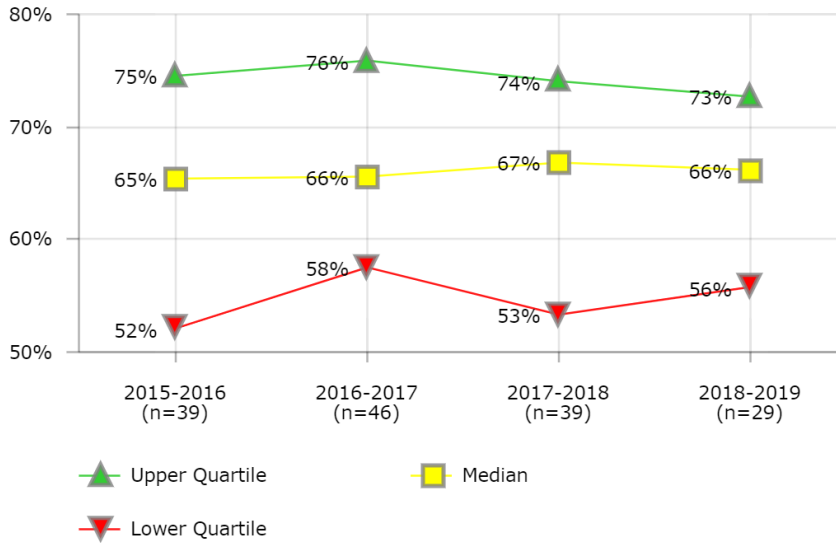
Districts in Best Quartile (2018-2019)

- Clark County School District
- Cleveland Metropolitan School District
- Columbus Public Schools
- Fort Worth Independent School District
- Fresno Unified School District
- Miami-Dade County Public Schools
- Palm Beach County School District
- Pittsburgh Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		81%		
2	86%	84%	80%	
3	78%	60%	67%	81%
4	72%	75%	75%	78%
5	80%	74%	76%	
7	72%	87%	76%	
8	59%	61%	64%	83%
9	84%	85%	87%	87%
10	80%	67%	61%	
12	83%	77%	84%	83%
13	83%		81%	79%
14	78%	76%		
15		100%		
18	66%	56%	61%	71%
20	44%	89%	90%	
27	43%	72%	62%	61%
28	79%	83%	73%	72%
29		73%		
30	65%	70%	68%	72%
32	89%	84%	82%	84%
34	72%			
35	87%	94%	85%	83%
37		69%	71%	
39	59%	63%		
40		74%		92%
41	88%	70%	60%	72%
43	67%	84%	81%	84%
44	56%	55%	65%	77%
45		90%		
46	60%	72%	72%	69%
48	67%	74%	74%	79%
49	64%	66%	73%	
50		84%	71%	76%
51	90%	65%		67%
52	63%	63%	52%	65%
53	85%	84%	80%	71%
54	70%	72%	75%	
55	76%	80%	83%	
57		85%	78%	86%
58	66%	72%	72%	78%
62	73%		70%	
63	69%	47%	49%	
66		77%		82%
67	86%	84%	81%	87%
71	80%	82%	80%	
74	85%			
76				77%
79		100%	73%	73%
91	77%	89%	84%	
97	75%	77%	73%	75%
431		84%	89%	

HUMAN RESOURCES

Teacher Retention - Remaining After 2 Years



District	2015-2016	2016-2017	2017-2018	2018-2019
1		85%		
2	70%	86%	84%	
3	58%	60%	52%	69%
4	63%	64%	67%	68%
5	78%	80%	74%	
7	64%	73%	69%	
8	51%	47%	50%	65%
9	75%	73%	74%	75%
10	66%	59%	43%	
12	80%	73%	85%	75%
13	72%		71%	73%
14	67%	64%		
15		100%		
18	48%	44%	43%	54%
20	35%	82%	81%	
27	36%	64%	54%	52%
28	78%	67%	53%	54%
29		56%		
30	60%	51%	57%	65%
32	66%	75%	78%	75%
34	53%			
35	76%	92%	75%	85%
37		58%	58%	
39	47%	51%		
40		60%		73%
41	52%	59%	48%	52%
43	63%	76%	73%	72%
44	67%	38%	54%	65%
45		75%		
46	49%	54%	55%	56%
48	76%	67%	74%	74%
49	48%	54%	53%	
50		79%	53%	65%
51	66%	42%		46%
52	65%	53%	41%	51%
53	80%	79%	72%	69%
54	58%	58%	64%	
55	68%	64%	71%	
57		67%	72%	66%
58	57%	64%	66%	65%
62	48%		69%	
63	50%	38%	42%	
66		63%		73%
67	85%	86%	84%	73%
71	54%	80%	65%	
74		75%		
76				55%
79		74%	76%	70%
91	81%	69%	75%	
97	66%	71%	64%	60%
431		90%	84%	

Description of Calculation

Number of teachers retained after two years, divided by number of teachers that were newly hired two years ago.

Importance of Measure

Based on review of this measure, a district may re-allocate funds to adopt new mentor/induction programs or revise their current programs. Districts will also have data available to justify making changes in their selection process and engaging local universities regarding coursework designed to better prepare graduates for urban teaching. By tracking, monitoring and examining retention of second year teachers, districts can measure early attrition rates and thereby manage the cost of bringing in new teachers, revised mentoring/induction program and maintain desired staff continuity.

Factors that Influence

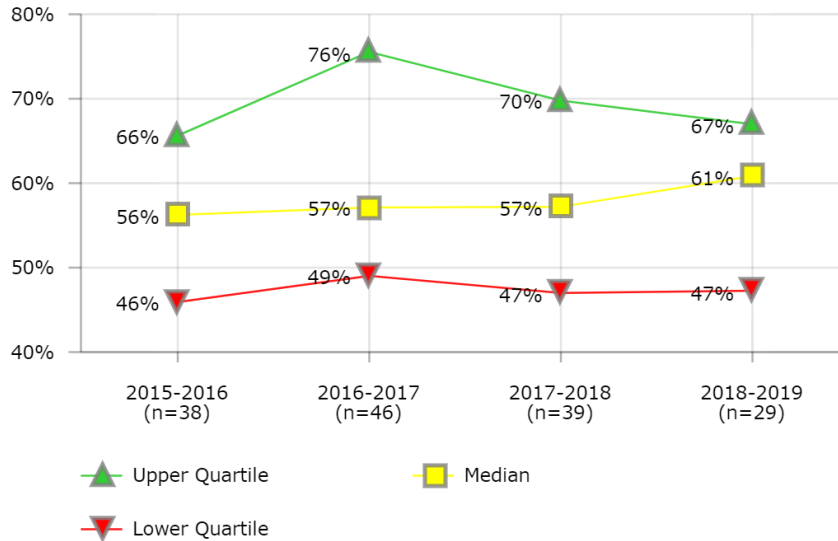
- Culture
- Communication
- School leadership
- Professional development
- Selection and hiring process
- Support

Districts in Best Quartile (2018-2019)

- Broward County Public Schools
- Clark County School District
- Columbus Public Schools
- Des Moines Public Schools
- Fresno Unified School District
- Miami-Dade County Public Schools
- Omaha Public School District
- Orange County Public School District

HUMAN RESOURCES

Teacher Retention - Remaining After 3 Years



Description of Calculation

Number of teachers retained after three years, divided by number of teachers that were newly hired three years ago.

Importance of Measure

Based on review of this measure, a district may re-allocate funds to adopt new mentor/induction programs or revise their current programs. Districts will also have data available to justify making changes in their selection process and engaging local universities regarding coursework designed to better prepare graduates for urban teaching. By tracking, monitoring and examining retention of third year teachers, districts can measure early attrition rates and thereby manage the cost of bringing in new teachers, revised mentoring/induction program and maintain desired staff continuity.

Factors that Influence

- Culture
- Communication
- School leadership
- Professional development
- Selection and hiring process
- Support

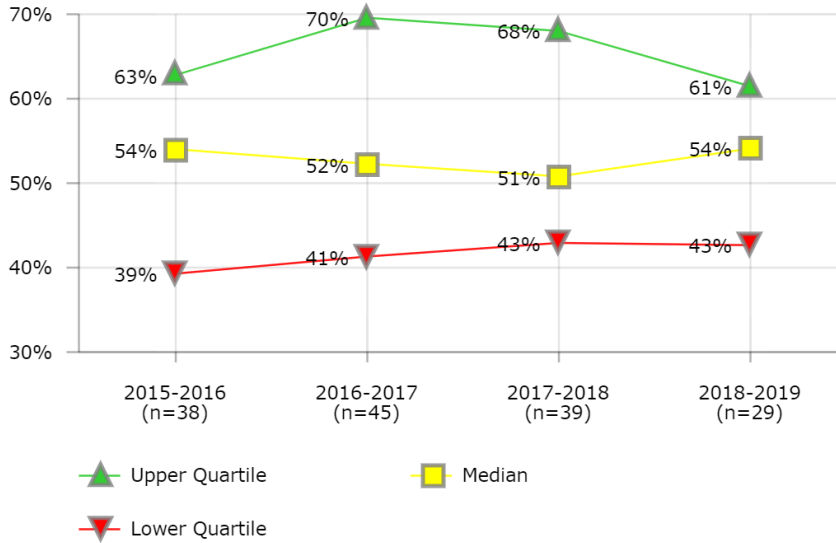
Districts in Best Quartile (2018-2019)

- Columbus Public Schools
- Fresno Unified School District
- Jefferson County Public Schools (KY)
- Miami-Dade County Public Schools
- Omaha Public School District
- Orange County Public School District
- Pittsburgh Public Schools
- Toledo Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		85%		
2	52%	70%	86%	
3	58%	53%	56%	53%
4	67%	56%	58%	63%
5	75%	78%	80%	
7	57%	60%	59%	
8	42%	43%	40%	58%
9	62%	67%	64%	64%
10	64%	53%	47%	
12	76%	70%	86%	66%
13	63%		64%	62%
14	63%	61%		
15		100%		
18	34%	35%	50%	41%
20	40%	78%	77%	
27	33%	49%	34%	47%
28	60%	60%	50%	44%
29		44%		
30	54%	51%	44%	57%
32	69%	62%	70%	72%
34	30%			
35	79%	89%	73%	75%
37		49%	50%	
39	42%	43%		
40		76%		62%
41	42%	40%	41%	42%
43	50%	57%	72%	67%
44	57%	36%	43%	54%
45		75%		
46	41%	45%	43%	41%
48	66%	76%	67%	74%
49	46%	42%	50%	
50		87%	49%	49%
51	46%	31%		38%
52	49%	63%	38%	40%
53	69%	79%	68%	67%
54	53%	50%	63%	
55	56%	51%	54%	
57		50%	57%	65%
58	46%	54%	56%	61%
62	53%		47%	
63	36%	29%	34%	
66		89%		75%
67	85%	85%	86%	67%
71	73%	54%	51%	
76				41%
79		57%	71%	72%
91	74%	74%	60%	
97	59%	57%	62%	53%
431		91%	90%	

HUMAN RESOURCES

Teacher Retention - Remaining After 4 Years



District	2015-2016	2016-2017	2017-2018	2018-2019
1		87%		
2	45%	52%	70%	
3	54%	55%	51%	56%
4	60%	62%	50%	54%
5	69%	75%	78%	
7	54%	52%	56%	
8	55%	37%	39%	50%
9	63%	58%	61%	58%
10	57%	55%	42%	
12	73%	69%	93%	56%
13	63%		60%	61%
14	64%	58%		
15		100%		
18			34%	34%
20	19%	74%	72%	
27	24%	41%	31%	33%
28	71%	49%	41%	43%
29		40%		
30	54%	47%	44%	47%
32	66%	71%	59%	60%
34	12%			
35	75%	85%	70%	73%
37		40%	43%	
39	35%	41%		
40		50%		64%
41	36%	34%	37%	42%
43	47%	38%	54%	68%
44	46%	30%	43%	43%
45		79%		
46	37%	39%	37%	39%
48	58%	66%	76%	67%
49	41%	43%	41%	
50		91%	47%	47%
51	35%	28%		30%
52	52%	41%	54%	39%
53	71%	69%	69%	65%
54	54%	48%	46%	
55	48%	45%	47%	
57		50%	44%	49%
58	33%	43%	48%	54%
62	53%		61%	
63	36%	29%	27%	
66		60%		67%
67	90%	85%	85%	61%
71	55%	73%	50%	
74	39%			
76				43%
79		50%	51%	66%
91	58%	70%	68%	
97	59%	54%	51%	57%
431		91%	91%	

Description of Calculation

Number of teachers retained after four years, divided by number of teachers that were newly hired four years ago.

Importance of Measure

The measure of attrition rates helps districts identify "hot spots" within a district by tracking, monitoring and examining teacher retention on a school-by-school basis. A low retention rate at a school may indicate a lack of support from the leadership of the district, insufficient professional development, and/or a misunderstanding of district's mission. A high retention rate may indicate stability and job satisfaction. The data can be used to show that continuity of teaching staff within a school has a positive effect on student achievement.

Factors that Influence

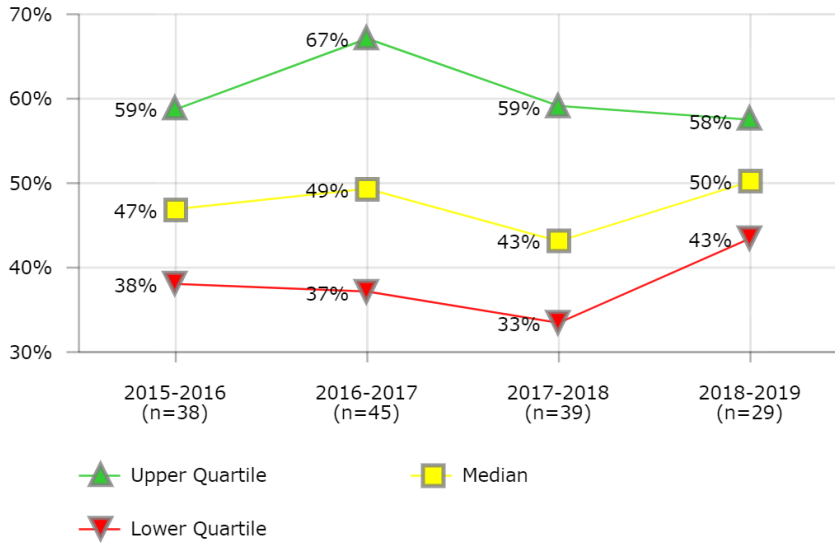
- Culture
- Communication
- School Leadership
- Professional development
- Selection and hiring process
- Support

Districts in Best Quartile (2018-2019)

- Columbus Public Schools
- Fort Worth Independent School District
- Fresno Unified School District
- Jefferson County Public Schools (KY)
- Omaha Public School District
- Orange County Public School District
- Pittsburgh Public Schools
- Toledo Public Schools

HUMAN RESOURCES

Teacher Retention - Remaining After 5 Years



Description of Calculation

Number of teachers retained after five years, divided by number of teachers that were newly hired five years ago.

Importance of Measure

The measure of attrition rates helps districts identify "hot spots" within a district by tracking, monitoring and examining teacher retention on a school-by-school basis. A low retention rate at a school may indicate a lack of support from the leadership of the district, insufficient professional development, and/or a misunderstanding of district's mission. A high retention rate may indicate stability and job satisfaction. The data can be used to show that continuity of teaching staff within a school has a positive effect on student achievement.

Factors that Influence

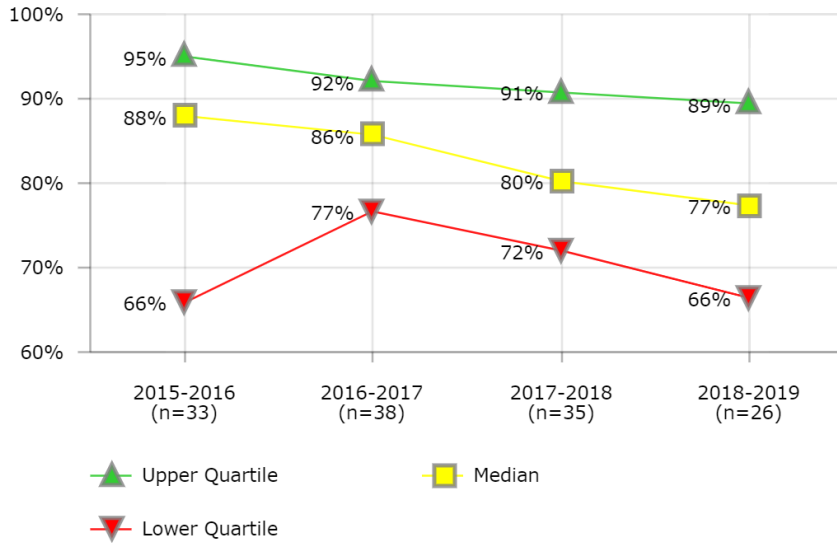
- Culture
- Communication
- School Leadership
- Professional development
- Selection and hiring process
- Support

Districts in Best Quartile (2018-2019)

- Broward County Public Schools
- Columbus Public Schools
- Fort Worth Independent School District
- Fresno Unified School District
- Jefferson County Public Schools (KY)
- Omaha Public School District
- Orange County Public School District
- Toledo Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		89%		
2	46%	45%	52%	
3	48%	53%	51%	53%
4	53%	56%	56%	47%
5	70%	69%	75%	
7	48%	47%	42%	
8	51%	50%	34%	46%
9	62%	59%	54%	56%
10	60%	48%	42%	
12	62%	60%	88%	55%
13	43%		56%	58%
14	55%	47%		
15		100%		
18			33%	27%
20	10%	95%	69%	
27	32%	37%	30%	29%
28	31%	38%	35%	33%
29		32%		
30	46%	50%	43%	44%
32	86%	67%	68%	57%
34	22%			
35	70%	81%	65%	70%
37		37%	43%	
39	24%	36%		
40		49%		70%
41	31%	35%	31%	50%
43	49%	45%	33%	53%
44	41%	28%	38%	43%
45		73%		
46	44%	34%	34%	32%
48	56%	58%	66%	76%
49	38%	37%	39%	
50		86%	25%	49%
51	34%	21%		26%
52	39%	49%	33%	53%
53	65%	70%	59%	64%
54	52%	48%	44%	
55	43%	38%	41%	
57		33%	31%	41%
58	28%	33%	40%	47%
62	41%		29%	
63	23%	21%	28%	
66		49%		60%
67	83%	90%	85%	60%
71	41%	55%	21%	
74	59%			
76				42%
79		99%	45%	71%
91	94%	58%	66%	
97	52%	50%	48%	48%
431		91%	91%	

HUMAN RESOURCES
Substitute Placement Rate



District	2015-2016	2016-2017	2017-2018	2018-2019
1		92%		
2	73%	82%	69%	
3	95%	92%	90%	89%
4	91%	89%	79%	76%
5	96%	96%	97%	
7	99%	97%	96%	
8	94%	94%	90%	96%
9	88%	88%	82%	54%
10	88%	57%	79%	
12	85%	84%	85%	76%
13			95%	66%
14	57%	77%		
18	1673%			77%
20		85%	59%	
27		77%	75%	88%
28	97%	98%	98%	98%
30	84%	84%	80%	70%
32			33%	27%
34	9%			
35	64%		55%	49%
37		90%	70%	
39	77%	82%		
40		86%		84%
41	59%	72%		
43	58%	65%	57%	54%
44	95%	97%	91%	92%
45		73%		
46	53%	72%	72%	68%
48	95%	96%	76%	91%
49	90%	86%	72%	
50			50%	34%
51	55%	53%		56%
52	66%	94%	96%	93%
54	83%	80%	76%	
55	78%	82%	71%	
57		86%	83%	87%
58	40%	73%	75%	77%
62	100%		100%	
63		75%		
66		81%		92%
67	98%	96%	93%	
71	92%	92%	88%	
74	72%			
76				77%
79			93%	88%
91	96%	88%	87%	
97	91%	89%	90%	89%
431		91%	80%	

Description of Calculation

Number of student attendance days where a substitute was successfully placed in a classroom, divided by the total number of student attendance days that classroom teachers were absent from their classrooms.

Importance of Measure

Failure to place substitutes to fill teacher absences can adversely affect students, as well as school staff, and should be reduced to a minimum.

Factors that Influence

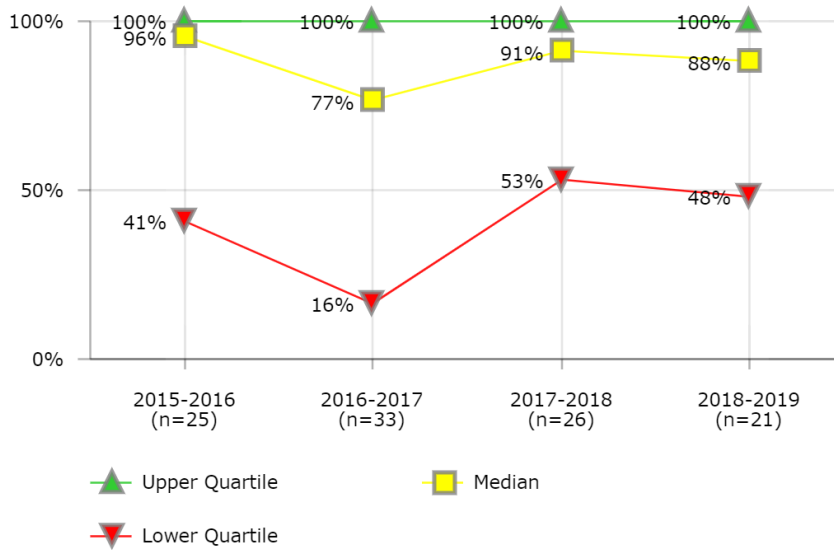
- Quality of substitute pool database
- Substitute back-up policy

Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Duval County Public Schools
- Minneapolis Public Schools
- Omaha Public School District
- Orange County Public School District
- Palm Beach County School District
- Pinellas County Schools

HUMAN RESOURCES

Substitute Placements With a BA/BS or Higher



Description of Calculation

Number of substitute teachers placed with a BA/BS or higher, divided by the total number of substitute teacher placements.

Importance of Measure

Increasing the number of substitutes with a college degree improves the students' experience when a teacher is absent.

Factors that Influence

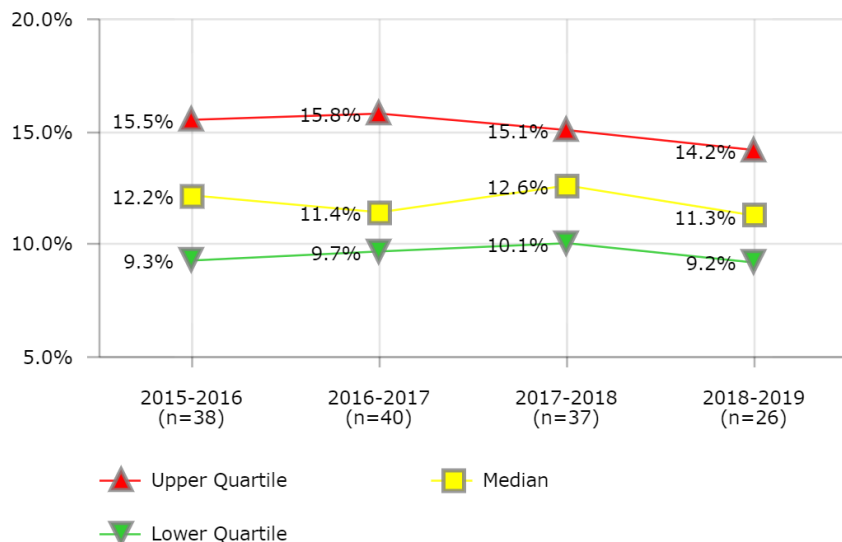
- Quality of substitute pool database
- Substitute back-up policy

Districts in Best Quartile (2018-2019)

- Columbus Public Schools
- Des Moines Public Schools
- Milwaukee Public Schools
- Omaha Public School District
- Pittsburgh Public Schools
- School District of Philadelphia
- St. Paul Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		83%		
2	95%	79%	95%	
3		108%		100%
5	100%	100%	100%	
7	100%	100%	100%	
8	64%	64%		
9	65%	65%	65%	96%
10	1%	1%	2%	
12	100%	100%	100%	100%
18	2%			
20		100%	100%	
27		77%	51%	47%
30	100%	0%	100%	100%
32		69%	66%	68%
35	2%	1%	100%	100%
37		95%	100%	
39	21%	16%		
40		66%		90%
41	100%	97%		
43	100%	100%	100%	100%
44	82%	83%	84%	84%
45		100%		
46		57%	53%	63%
48	75%	1%	75%	74%
49	96%	77%	84%	
50			88%	88%
51	100%	49%		2%
52	2%	2%	2%	2%
54	100%	100%	100%	
55	41%	38%	35%	
58	100%	100%	100%	100%
62	119%			
63		1%		
66				100%
67	99%	100%	98%	99%
74	100%			
76				48%
79			101%	1%
97	2%	2%	2%	2%
431		16%	23%	

HUMAN RESOURCES
Employee Separation Rate



District	2015-2016	2016-2017	2017-2018	2018-2019
1		10.7%		
2	15.5%	11.5%	12.4%	
3	7.0%	6.1%	8.1%	8.9%
4	11.7%	11.5%	10.6%	10.6%
5	10.6%		16.0%	
7	10.5%	9.6%	12.6%	
8	13.1%	11.0%	10.8%	10.5%
9	11.3%	10.6%	11.4%	12.3%
10	12.0%	11.0%	15.4%	
12	8.3%	10.3%	12.2%	12.1%
13	9.7%		10.1%	9.2%
14	12.4%	14.8%		
18	12.8%	15.8%	16.4%	10.1%
20	3.1%	9.1%	16.2%	
27			12.8%	12.3%
28	14.9%	17.1%	11.6%	14.4%
30	9.5%	10.0%	13.1%	13.3%
32	8.4%	7.9%	7.8%	8.1%
34	27.7%			
35	8.2%	9.3%	9.9%	9.7%
37		22.7%		
39	27.3%	21.2%		
40		16.0%		
41	17.7%	17.3%	15.1%	8.6%
43	6.3%	6.0%	6.3%	5.6%
44	17.2%	16.9%	17.7%	15.6%
45		9.2%		
46	11.1%	15.7%	14.7%	21.6%
48	12.9%	12.6%	12.8%	14.2%
49	13.8%	13.0%	13.9%	
50			16.8%	14.6%
51	42.9%	35.2%		17.2%
52	16.8%	15.1%	18.8%	17.6%
53	13.6%	11.2%	13.3%	13.4%
54	15.7%	13.4%	11.7%	
55	19.7%	17.1%	18.3%	
57		11.0%	9.8%	10.2%
58	15.5%	16.5%	13.8%	11.2%
62	6.4%			
63	19.2%	12.5%	18.8%	
67	7.3%	6.6%	6.3%	7.6%
71	14.4%	15.8%	15.0%	
74	5.1%			
79		7.2%	7.6%	7.6%
91	9.3%	11.3%	11.5%	
97	11.1%	6.8%	7.7%	11.4%
431		9.7%	6.6%	

Description of Calculation

Total number of employees that left the district (retirement, resignation or termination), divided by the total number of district employees (FTEs).

Importance of Measure

These measures may serve as indicators of district policies, administrative procedures and regulations, and management effectiveness. Measuring these allows the district to further analyze its actions in terms of resources, allocation of funds, policy and support to its employees. They also may be measures of workforce satisfaction and organizational climate.

Factors that Influence

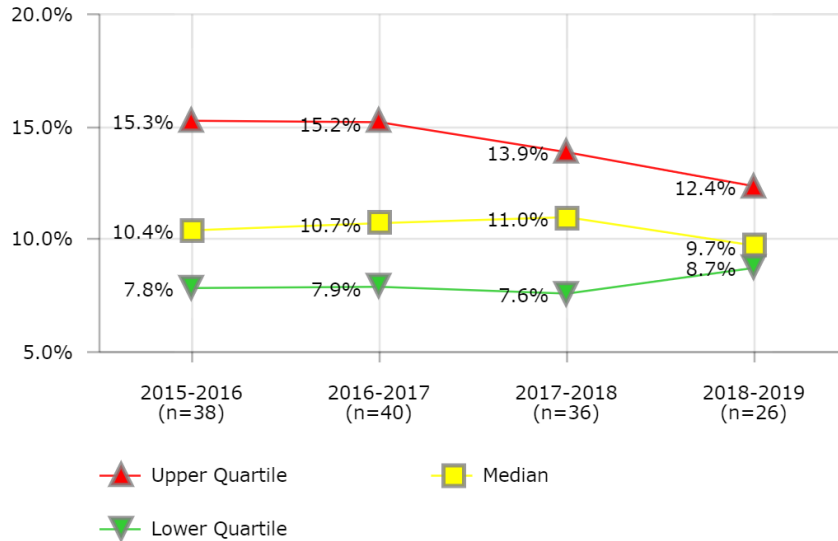
- Compensation and benefits
- Recognition and rewards
- Career path/advancement
- Age distribution of workforce
- Effectiveness of leadership
- Training and professional development

Districts in Best Quartile (2018-2019)

- Broward County Public Schools
- Dallas Independent School District
- Fresno Unified School District
- Miami-Dade County Public Schools
- Pittsburgh Public Schools
- St. Paul Public Schools
- Toledo Public Schools

HUMAN RESOURCES

Employee Separation Rate - Teachers



Description of Calculation

Number of teachers that left the district (retirement, resignation or termination), divided by the total number of teachers (FTEs).

Importance of Measure

These measures may serve as indicators of district policies, administrative procedures and regulations, and management effectiveness. Measuring these allows the district to further analyze its actions in terms of resources, allocation of funds, policy and support to its employees. They also may be measures of workforce satisfaction and organizational climate.

Factors that Influence

- Compensation and benefits
- Recognition and rewards
- Career path/advancement
- Age distribution of workforce
- Effectiveness of leadership
- Training and professional development

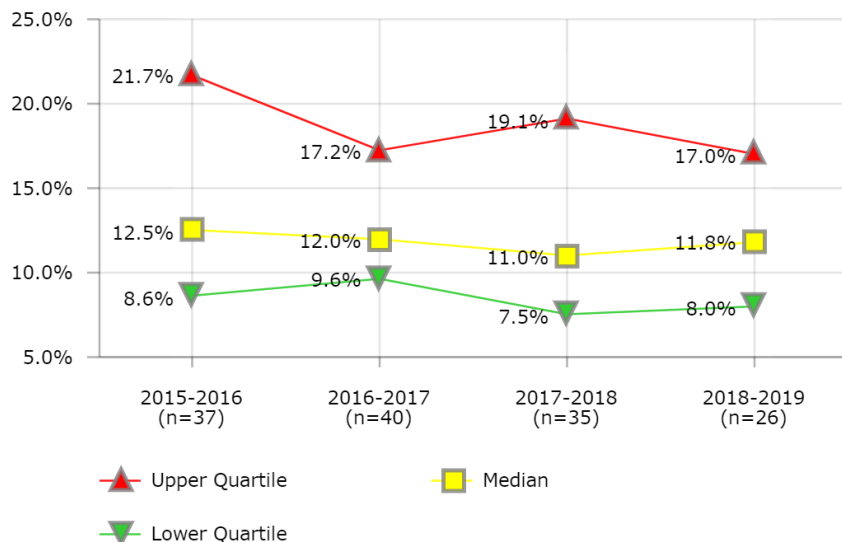
Districts in Best Quartile (2018-2019)

- Cleveland Metropolitan School District
- Columbus Public Schools
- Dallas Independent School District
- Miami-Dade County Public Schools
- Pittsburgh Public Schools
- St. Paul Public Schools
- Toledo Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		10.2%		
2	17.4%	13.2%	14.2%	
3	5.0%	4.0%	4.4%	4.5%
4	10.9%	11.0%	9.7%	9.6%
5	9.0%		7.8%	
7	8.2%	8.6%	7.8%	
8	12.9%	11.0%	10.8%	8.8%
9	9.9%	9.4%	9.6%	9.8%
10	11.8%	10.8%	11.7%	
12	4.6%	7.3%	9.0%	8.9%
13	8.8%		10.3%	10.0%
14	7.8%	8.0%		
18	13.8%	17.3%	12.6%	9.6%
20	3.5%	6.5%		
27			16.1%	14.2%
28	14.3%	16.1%	12.7%	18.4%
30	7.9%	8.6%	12.4%	11.5%
32	7.9%	7.8%	7.4%	7.6%
34	20.6%			
35	5.6%	6.9%	7.9%	5.9%
37		15.4%		
39	19.0%	15.7%		
40		15.0%		
41	3.0%	18.8%	18.4%	7.6%
43	5.1%	5.5%	4.9%	4.9%
44	17.9%	17.8%	17.8%	15.7%
45		5.4%		
46	13.3%	15.1%	13.2%	12.8%
48	14.2%	11.8%	14.3%	16.9%
49	15.3%	12.3%	14.9%	
50			14.0%	12.4%
51	54.5%	45.6%		21.3%
52	12.3%	10.6%	13.7%	10.9%
53	9.1%	9.0%	8.4%	9.3%
54	16.3%	14.0%	11.1%	
55	19.9%	15.4%	15.4%	
57		8.0%	7.1%	7.0%
58	17.3%	12.3%	13.4%	9.7%
62	6.5%			
63	23.0%	15.9%	26.2%	
67	8.6%	7.6%	6.8%	9.7%
71	14.5%	16.5%	13.8%	
74	5.2%			
79		8.7%	6.2%	8.7%
91	5.6%	5.9%	7.4%	
97	9.4%	5.8%	6.6%	10.8%
431		8.7%	3.3%	

HUMAN RESOURCES

Employee Separation Rate - Instructional Support Staff



District	2015-2016	2016-2017	2017-2018	2018-2019
1		9.9%		
2	22.2%	12.7%	2.9%	
3	9.5%	8.8%	14.4%	20.5%
4	10.5%	8.0%	9.0%	8.0%
5	5.8%		3.2%	
7	21.7%	17.4%	22.5%	
8	17.1%	12.6%	12.6%	17.1%
9	25.6%	22.7%	28.8%	34.8%
10	11.9%	12.0%	46.3%	
12	6.9%	12.0%	16.5%	17.0%
13	7.6%		8.2%	6.2%
14		72.7%		
18	15.5%	14.2%	7.2%	7.3%
20	3.2%	11.6%	20.7%	
27			5.9%	11.8%
28	36.4%	34.0%	6.6%	9.7%
30	11.9%	11.4%	13.3%	13.4%
32	11.7%	9.9%	11.0%	12.6%
34	25.7%			
35	19.2%	11.9%	8.1%	12.7%
37		17.1%		
39	58.4%	38.1%		
40		14.8%		
41	1.8%	13.8%		8.3%
43	5.3%	5.0%	7.5%	6.0%
44	13.6%	12.4%	12.6%	10.8%
45		8.7%		
46	8.1%	7.1%	8.3%	5.8%
48	8.6%	11.2%	8.3%	8.7%
49	15.1%	15.6%	15.4%	
50		21.3%	19.1%	9.2%
51	47.5%	11.8%		11.8%
52	25.5%	25.5%	28.9%	32.6%
53	128.5%			22.6%
54	9.6%	9.4%	8.3%	
55	14.1%	9.9%	8.3%	
57		8.9%	8.8%	4.6%
58	14.0%	21.8%	14.1%	14.3%
62	13.4%			
63	11.9%	12.7%	7.1%	
67	6.1%	8.9%	7.0%	6.6%
71	9.9%	22.1%	11.5%	
74	1.8%			
79		6.2%	49.2%	26.7%
91	35.3%	17.6%	35.1%	
97	12.5%	7.1%	7.3%	13.2%
431		10.1%	20.2%	

Description of Calculation

Number of instructional support staff that left the district (retirement, resignation or termination), divided by the total number of instructional support staff (FTEs).

Importance of Measure

These measures may serve as indicators of district policies, administrative procedures and regulations, and management effectiveness. Measuring these allows the district to further analyze its actions in terms of resources, allocation of funds, policy and support to its employees. They also may be measures of workforce satisfaction and organizational climate.

Factors that Influence

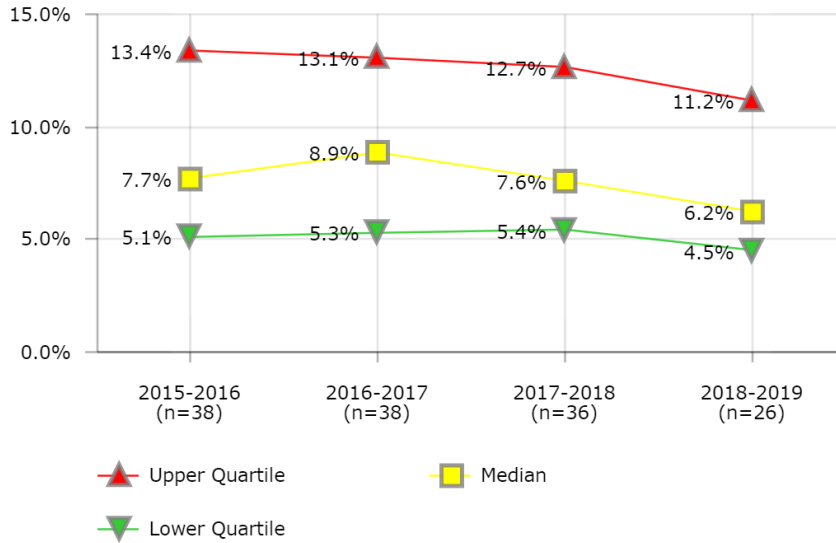
- Compensation and benefits
- Recognition and rewards
- Career path/advancement
- Age distribution of workforce
- Effectiveness of leadership
- Training and professional development

Districts in Best Quartile (2018-2019)

- Baltimore City Public Schools
- Broward County Public Schools
- Cleveland Metropolitan School District
- Fresno Unified School District
- Pittsburgh Public Schools
- Shelby County Schools
- Wichita Unified School District

HUMAN RESOURCES

Employee Separation Rate - School-Based Exempt Staff



Description of Calculation

Number of school-based exempt staff that left the district (retirement, resignation or termination), divided by the total number of school-based exempt staff (FTEs).

Importance of Measure

These measures may serve as indicators of district policies, administrative procedures and regulations, and management effectiveness. Measuring these allows the district to further analyze its actions in terms of resources, allocation of funds, policy and support to its employees. They also may be measures of workforce satisfaction and organizational climate.

Factors that Influence

- Compensation and benefits
- Recognition and rewards
- Career path/advancement
- Age distribution of workforce
- Effectiveness of leadership
- Training and professional development

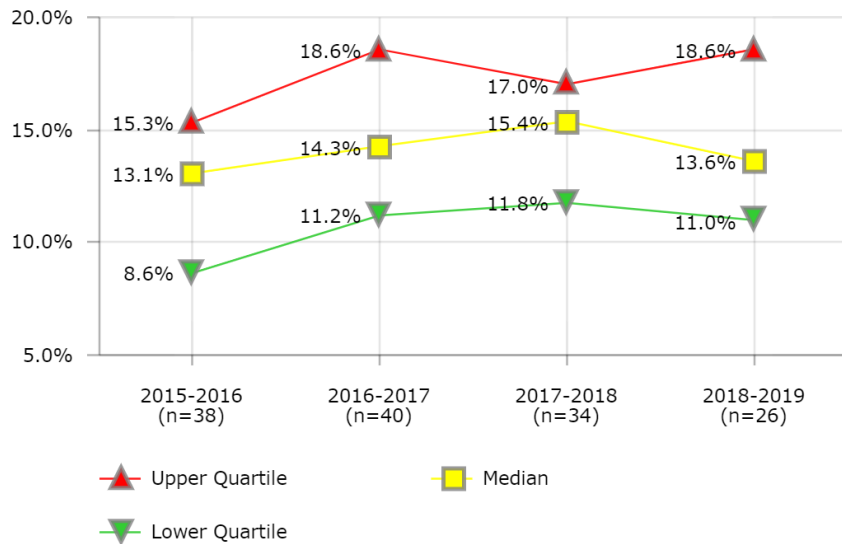
Districts in Best Quartile (2018-2019)

- Broward County Public Schools
- Fresno Unified School District
- Miami-Dade County Public Schools
- Norfolk School District
- Orange County Public School District
- Palm Beach County School District
- Toledo Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		10.3%		
2	8.6%	8.8%	8.2%	
3	13.8%	13.1%	7.4%	11.2%
4	3.7%	5.8%	7.3%	7.4%
5	4.3%		8.7%	
7	11.1%	8.9%	33.7%	
8	6.0%	5.3%	5.2%	3.4%
9	5.0%	6.6%	5.6%	7.0%
10	17.3%	1.6%	1.7%	
12	9.3%	5.0%	5.0%	14.1%
13	5.2%		4.0%	3.0%
14	4.1%	39.4%		
18	14.5%			4.7%
20	4.3%	12.0%	20.2%	
27			8.6%	4.4%
28	5.6%	24.6%	21.5%	16.9%
30	7.0%	4.6%	6.2%	6.1%
32	5.8%	4.0%	6.6%	4.5%
34	13.4%			
35	5.5%	5.7%	5.8%	9.8%
37		53.6%		
39	19.1%	15.6%		
40		7.5%		
41	14.5%	13.4%	17.8%	5.4%
43	3.0%	6.3%	4.7%	5.5%
44	6.2%	7.8%	7.2%	6.3%
46	6.5%	26.2%	26.4%	4.9%
48	7.6%	6.6%	8.1%	4.3%
49	11.3%	10.1%	9.1%	
50		4.4%	13.3%	11.2%
51	9.2%	82.7%		11.0%
52	12.8%	11.0%	14.2%	14.9%
53	5.1%	1.7%	10.3%	15.5%
54	10.8%	10.2%	7.8%	
55	10.1%	9.2%	7.1%	
57		7.0%	12.0%	13.0%
58	14.3%	9.2%	10.8%	5.3%
62	0.8%			
63	18.1%	11.4%	18.7%	
67	2.6%	2.8%	2.5%	2.6%
71	33.9%	14.4%	32.8%	
74	7.8%			
79			2.4%	1.3%
91	25.1%	2.7%	1.0%	
97	4.0%	5.3%	3.8%	7.6%
431		24.8%	6.1%	

HUMAN RESOURCES

Employee Separation Rate - School-Based Non-Exempt Staff



District	2015-2016	2016-2017	2017-2018	2018-2019
1		11.7%		
2	12.9%	8.9%	18.2%	
3	14.8%	11.9%	15.6%	13.1%
4	13.6%	14.5%	12.9%	13.0%
5	15.3%			
7	8.0%	8.5%	19.1%	
8	14.6%	12.2%	12.0%	14.9%
9	11.2%	10.7%	11.6%	13.7%
10	10.2%	12.5%	15.4%	
12	17.8%	17.0%	20.8%	18.6%
13	12.6%		11.8%	11.0%
14	6.4%	7.0%		
18	13.1%	17.8%	33.8%	14.8%
20	1.3%	13.2%		
27			12.5%	12.7%
28	16.8%	14.5%	9.9%	10.4%
30	14.0%	14.1%	14.2%	20.3%
32	8.0%	7.7%	8.4%	8.4%
34	41.4%			
35	16.5%	36.1%	30.9%	12.6%
37		30.3%		
39	22.3%	23.9%		
40		15.8%		
41	10.6%	14.9%	16.3%	8.1%
43	9.1%	8.1%	6.0%	8.0%
44	19.4%	14.9%	18.3%	19.1%
45		31.0%		
46	8.6%	13.0%	13.8%	25.1%
48	15.1%	18.5%	15.9%	15.8%
49	14.3%	17.6%	16.8%	
50		16.1%	16.6%	23.7%
51	75.4%	35.9%		14.1%
52	20.4%	20.5%	28.9%	27.3%
53	7.7%	8.7%	14.0%	22.2%
54	13.0%	12.1%	12.3%	
55	26.1%	25.3%		
57		18.6%	17.0%	13.6%
58	13.2%	22.2%	15.4%	13.6%
62	5.8%			
63	4.1%	5.8%	21.3%	
67	5.8%	5.3%	4.3%	3.7%
71	15.3%	14.1%	16.1%	
74	7.9%			
79			6.0%	2.7%
91	11.9%	55.1%	16.9%	
97	13.0%	8.3%	9.7%	11.0%
431		12.9%	9.9%	

Description of Calculation

Number of school-based non-exempt staff that left the district (retirement, resignation or termination), divided by the total number of school-based non-exempt staff (FTEs).

Importance of Measure

These measures may serve as indicators of district policies, administrative procedures and regulations, and management effectiveness. Measuring these allows the district to further analyze its actions in terms of resources, allocation of funds, policy and support to its employees. They also may be measures of workforce satisfaction and organizational climate.

Factors that Influence

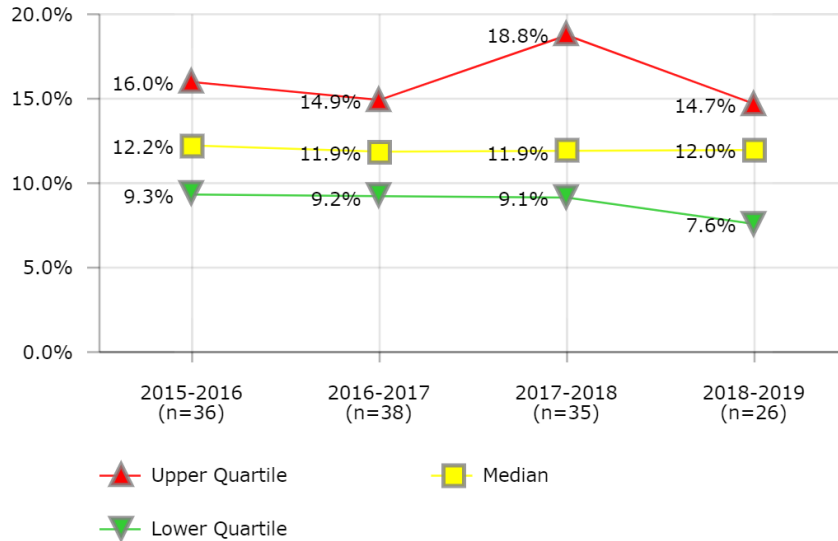
- Compensation and benefits
- Recognition and rewards
- Career path/advancement
- Age distribution of workforce
- Effectiveness of leadership
- Training and professional development

Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Broward County Public Schools
- Dallas Independent School District
- Fresno Unified School District
- Miami-Dade County Public Schools
- Pittsburgh Public Schools
- Toledo Public Schools

HUMAN RESOURCES

Employee Separation Rate - Non-School Non-Exempt Staff



Description of Calculation

Number of non-school non-exempt staff that left the district (retirement, resignation or termination), divided by the total number of non-school non-exempt staff (FTEs).

Importance of Measure

These measures may serve as indicators of district policies, administrative procedures and regulations, and management effectiveness. Measuring these allows the district to further analyze its actions in terms of resources, allocation of funds, policy and support to its employees. They also may be measures of workforce satisfaction and organizational climate.

Factors that Influence

- Compensation and benefits
- Recognition and rewards
- Career path/advancement
- Age distribution of workforce
- Effectiveness of leadership
- Training and professional development

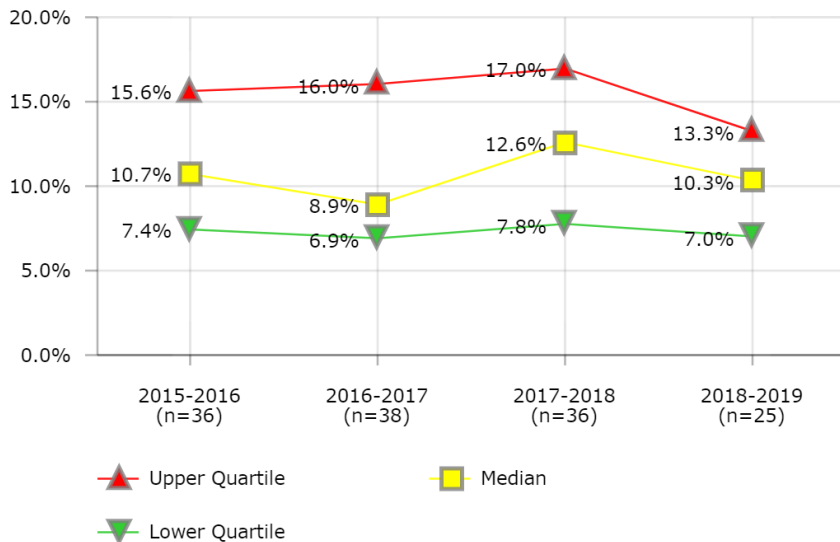
Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Broward County Public Schools
- Jefferson County Public Schools (KY)
- Milwaukee Public Schools
- Pittsburgh Public Schools
- St. Paul Public Schools
- Toledo Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		10.8%		
2	11.6%	9.2%	4.8%	
3	3.8%	3.3%	10.0%	7.5%
4	15.4%	10.0%	11.4%	13.3%
5	9.8%			
7	12.7%	6.7%	8.1%	
8	13.8%	10.7%	10.6%	11.9%
9	12.6%	12.2%	11.8%	13.3%
10	19.9%	10.8%	13.4%	
12	26.5%	25.7%	23.8%	21.8%
13	11.4%		8.8%	7.5%
18	15.9%	11.3%	21.6%	12.0%
20	1.7%	11.6%	22.5%	
27			11.9%	10.9%
28	6.2%	8.3%	7.8%	6.3%
30	6.3%	12.4%	24.5%	4.5%
32	10.7%	9.9%	9.1%	10.6%
34	23.9%			
35	1.5%	2.3%	4.3%	12.1%
37		15.6%		
39	70.6%	37.8%		
40		67.1%		
41		22.4%		22.2%
43	13.1%	5.8%	13.7%	6.3%
44	13.9%	21.8%	22.2%	15.8%
45		25.3%		
46	11.1%	18.6%	13.6%	35.2%
48	11.8%	12.7%	10.6%	10.9%
49	9.7%	9.5%	9.9%	
50			22.7%	24.2%
51	17.7%	13.4%		14.7%
52	16.1%	13.7%	14.6%	14.3%
53	20.7%	6.1%	5.8%	7.6%
54	16.2%	14.9%	20.7%	
55	13.9%	14.4%	18.8%	
57		36.7%	13.3%	32.3%
58	12.5%	13.3%	12.3%	8.6%
62	2.5%			
63	70.4%	7.0%	13.9%	
67	8.2%	5.6%	10.4%	9.9%
71	12.0%	14.2%	22.4%	
74	6.0%			
79			3.0%	7.4%
91	9.0%	12.8%	16.1%	
97	11.2%	9.4%	11.1%	12.8%
431		6.8%	5.7%	

HUMAN RESOURCES

Employee Separation Rate - Non-School Exempt Staff



District	2015-2016	2016-2017	2017-2018	2018-2019
1		10.7%		
2	11.4%	8.2%	15.0%	
3		14.1%	10.4%	14.3%
4	13.5%	7.4%	7.9%	9.0%
5	19.2%			
7	14.8%	8.9%	13.2%	
8	9.8%	5.0%	4.7%	8.6%
9	4.4%	2.7%	3.6%	3.3%
10	3.5%	2.7%	14.9%	
12	3.1%	8.0%	10.7%	7.0%
13	4.9%		7.5%	7.8%
14		56.9%		
18	5.4%	7.6%	14.9%	11.3%
20	9.0%	2.1%	40.4%	
27			21.8%	7.7%
28	12.8%	20.6%	17.0%	15.2%
30	6.9%	7.3%	14.3%	13.4%
32	10.4%	6.9%	7.6%	5.9%
34	60.0%			
35	14.3%	16.7%	12.5%	15.6%
37		34.0%		
39	15.9%	15.8%		
41	32.1%	17.7%	22.0%	9.6%
43	8.0%	6.6%	7.0%	5.0%
44	6.7%	16.0%	24.2%	11.8%
45		13.3%		
46	11.2%	31.5%	30.8%	
48	7.9%	8.2%	6.9%	10.3%
49	9.3%	14.3%	12.3%	
50			18.6%	23.5%
51	15.2%	26.5%		13.3%
52	24.7%	14.1%	20.1%	16.2%
53	30.4%	3.0%	19.7%	12.7%
54	46.8%	25.0%	16.9%	
55	10.7%	11.9%	16.6%	
57		5.5%	12.7%	11.7%
58	18.0%	34.9%	12.8%	11.9%
62	10.4%			
63	10.7%	7.5%	12.5%	
67	6.9%	3.8%	6.1%	5.4%
71	15.3%	11.6%	7.2%	
74	18.8%			
79		8.9%	10.0%	3.7%
91	4.5%	5.8%	9.0%	
97	9.4%	6.9%	9.0%	5.6%
431			6.1%	

Description of Calculation

Number of non-school exempt staff that left the district (retirement, resignation or termination), divided by the total number of non-school exempt staff (FTEs).

Importance of Measure

These measures may serve as indicators of district policies, administrative procedures and regulations, and management effectiveness. Measuring these allows the district to further analyze its actions in terms of resources, allocation of funds, policy and support to its employees. They also may be measures of workforce satisfaction and organizational climate.

Factors that Influence

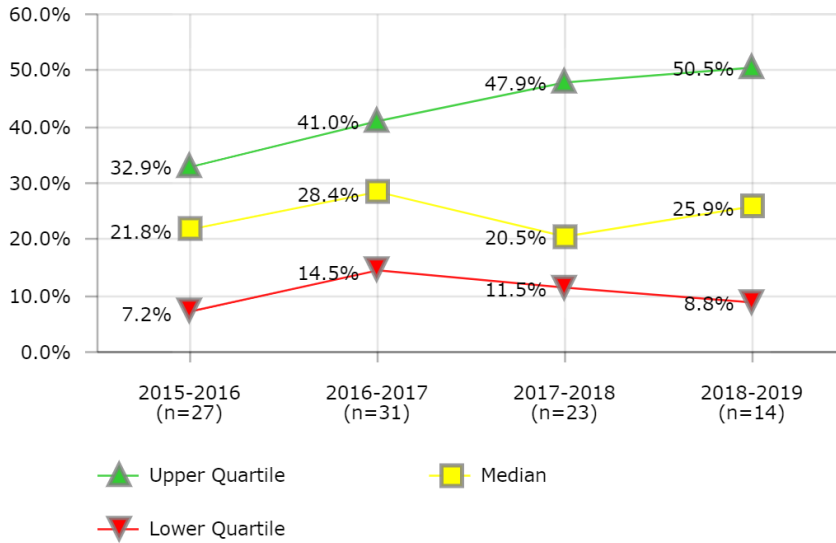
- Compensation and benefits
- Recognition and rewards
- Career path/advancement
- Age distribution of workforce
- Effectiveness of leadership
- Training and professional development

Districts in Best Quartile (2018-2019)

- Clark County School District
- Des Moines Public Schools
- Fresno Unified School District
- Miami-Dade County Public Schools
- Pinellas County Schools
- Pittsburgh Public Schools
- Toledo Public Schools

HUMAN RESOURCES

Exit Interview Completion Rate



Description of Calculation

Total number of exit interviews completed, divided by the total number of employee separations (including retirement, resignation and termination) in the district.

Importance of Measure

Exit interviews can provide important insight into problems and patterns.

Factors that Influence

- Placement of exit interview on separation/resignation forms
- Internal review processes
- Pro-active focus on customer service

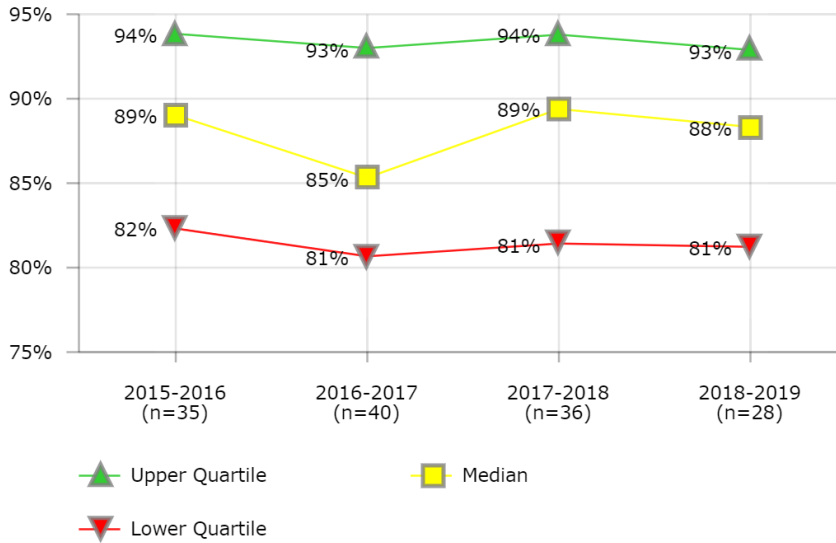
Districts in Best Quartile (2018-2019)

- Cleveland Metropolitan School District
- Fort Worth Independent School District
- Milwaukee Public Schools
- Norfolk School District

District	2015-2016	2016-2017	2017-2018	2018-2019
2	3.7%	21.0%	13.0%	
3	4.0%	1.3%		0.8%
5	90.4%	89.6%	82.1%	
7	32.8%	41.0%		
9	10.6%	12.3%	9.8%	6.8%
10	100.0%	29.5%	9.1%	
12	29.3%	31.5%	15.2%	
13	24.3%		23.0%	18.7%
14	2.3%	2.1%		
15		21.8%		
20	32.9%	14.5%		
27	45.7%	66.4%	56.3%	57.5%
28	32.6%	47.9%	61.4%	36.8%
30	46.6%	94.0%	39.9%	84.7%
32			100.0%	
37			9.1%	
39	6.2%	2.4%		
40		92.5%		91.2%
41	22.0%	47.5%		
44	31.4%	40.5%	47.9%	
48	11.5%	20.6%	15.7%	14.7%
49	10.3%	11.5%	13.0%	
51	7.2%	10.3%		37.4%
52	9.2%	29.2%	23.9%	30.6%
53		35.4%		
55	0.8%	7.8%		
57		21.9%	46.0%	50.5%
58	8.7%	19.8%	9.7%	21.1%
62	1.3%		5.0%	
63	21.8%	16.9%	24.8%	
67	81.3%	70.1%		8.8%
71	19.9%	18.2%	53.0%	
79		28.4%	20.5%	1.1%
91	40.7%	31.9%	11.5%	
431		32.3%	12.8%	

HUMAN RESOURCES

Health Benefits Enrollment Rate



District	2015-2016	2016-2017	2017-2018	2018-2019
2	83%	74%	84%	
3	82%	84%	83%	87%
4	85%	81%	79%	81%
5	93%	93%	93%	
7	89%	85%	83%	
8	90%	90%	90%	89%
9	96%	95%	97%	96%
10	85%	84%	87%	
12	81%	88%	92%	90%
13	94%		94%	94%
14	66%	66%		
18	62%	72%	75%	69%
20	83%	84%	93%	
27		80%	69%	71%
28	92%	84%	81%	81%
30	90%	80%	89%	88%
32	93%	93%	93%	91%
34	93%			
35	89%	86%	92%	89%
39	79%	68%		
40		54%		51%
41	74%	68%		
43	90%	90%	89%	88%
44	99%	97%	97%	95%
45		94%		
46	91%		90%	94%
47		95%		
48			88%	95%
49	86%	83%	81%	
50			79%	71%
51	81%	79%		84%
52	77%	82%	77%	81%
53	82%	83%	82%	85%
54	94%	95%	96%	
55	84%	82%	69%	
57		87%	86%	90%
58	99%	93%		92%
62			95%	
63	98%	98%	98%	
66		95%		92%
67	100%	100%	100%	100%
71	94%	93%	93%	
76				85%
79		88%	94%	98%
91	98%	98%	98%	
97	78%	87%	78%	77%
431		79%	91%	

Description of Calculation

Total number of employees enrolled in health benefits plan, divided by total number of employees eligible for health benefits.

Importance of Measure

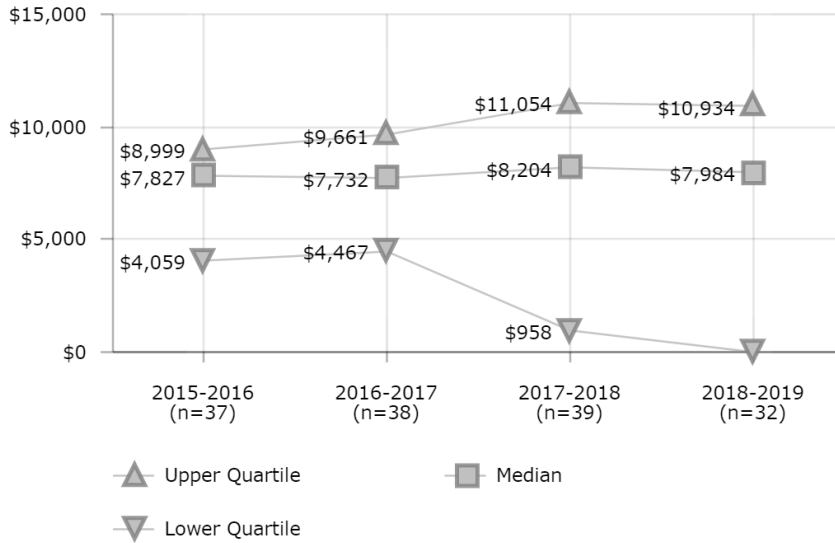
Identifies the level of employee enrollment in the district health benefits plan.

Districts in Best Quartile (2018-2019)

- Baltimore City Public Schools
- Broward County Public Schools
- Clark County School District
- Duval County Public Schools
- Fresno Unified School District
- Orange County Public School District
- Toledo Public Schools

HUMAN RESOURCES

Health Benefits Cost per Enrolled Employee



Description of Calculation

Total health benefits cost (self-insured) plus total health benefits premium costs, divided by total number of employees enrolled in health benefits plan.

Importance of Measure

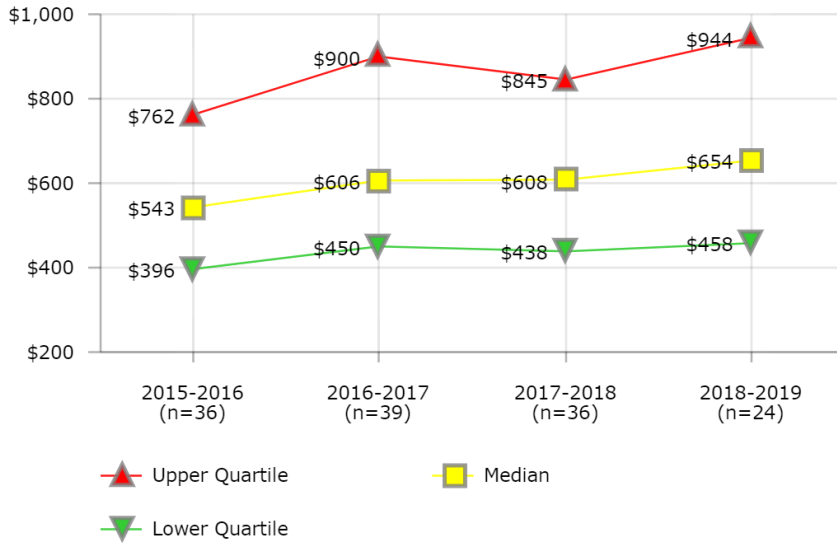
It is important to all districts to have a competitive benefit package to attract and retain employees. However, health care costs represent an increasing percentage of overall employee costs. Rapid increases in health care costs make it even more critical for districts to ensure that their health care dollars are well spent and their benefits are competitive. Health care costs are an important component in the total compensation package of employees. While it is important to provide good benefits it is also equally important to do it at a competitive cost compared with other districts that are competing for the same applicants.

Factors that Influence

- Costs may be influenced by district wellness programs and promoting healthy lifestyles
- Plan benefits and coverage (individual, individual & spouse, family, etc.) are major factors in determining costs.
- Costs are influenced by availability and competitiveness of providers.
- Costs are influenced by geographic location (reasonable and customary charges for each location).
- Costs may vary based on plan structure (fully insured, self insured, minimum premium etc.).
- Increased costs in health care will mean less money available for salary or other benefits.

District	2015-2016	2016-2017	2017-2018	2018-2019
2	\$8,999	\$8,750	\$197	
3	\$8,260	\$9,661	\$9,911	\$10,035
4	\$535	\$612	\$958	\$936
5	\$11,984	\$978	\$986	
7		\$1	\$940	
8	\$6,922	\$6,760	\$8,293	\$8,671
9	\$6,690	\$6,741	\$6,626	\$7,138
10	\$8,381	\$7,235	\$8,431	
11				\$0
12	\$13,730		\$16,468	\$16,370
13			\$6,769	\$8,074
14	\$7,827	\$825		
16	\$3,844			\$2
18	\$7,219	\$10,528	\$10,586	\$0
20	\$8,518	\$11,319	\$13,855	
27		\$8,845		\$7,958
28	\$10,780	\$13,731	\$14,831	\$13,116
30	\$14,670	\$16,024	\$18,745	\$19,818
32	\$8,999	\$9,177	\$0	\$0
35			\$15,337	
37		\$7,939	\$6,823	
39	\$5,167	\$626		
40		\$3,475		
41	\$3,701	\$3,990		
43	\$15,468	\$14,684	\$14,842	\$15,371
44	\$7,918	\$7,998	\$8,511	\$8,699
45		\$15		
46	\$9,263		\$12,792	\$12,833
48	\$8,255	\$9,648	\$9,723	\$10,119
49	\$7,009	\$6,745	\$7,317	
50			\$8,263	\$8,011
51	\$9,888	\$6,598		
52	\$1,724	\$4,467	\$7,688	\$7,562
54	\$7	\$6,487	\$8,390	
56	\$3,109		\$1	\$4
57		\$14,559	\$16,743	\$18,401
58	\$8,867	\$11,258		\$10,622
61	\$4,059		\$2	\$3
62	\$8,539		\$16,497	\$7
63	\$9,410	\$730	\$10,559	
66		\$9,372		\$10,936
67	\$7,691	\$8,331	\$8,204	\$10,999
71	\$6,919	\$6,460	\$6,883	
76				\$0
77	\$3,042		\$2	\$1
79		\$15,096	\$1	\$1
91	\$7,198	\$7,525	\$7,320	
97	\$12,787	\$8,760	\$11,054	\$10,932
101	\$1,922		\$11	\$5
431		\$5,670	\$6,184	
1728	\$2,524	\$17,161	\$103	\$11

HUMAN RESOURCES
HR Cost per District FTE



District	2015-2016	2016-2017	2017-2018	2018-2019
1		\$1,168		
2	\$682	\$669	\$797	
3	\$532	\$523	\$547	\$591
4	\$273	\$399	\$335	\$260
5	\$649		\$1,336	
7	\$406	\$434	\$530	
8	\$312	\$296	\$282	\$284
9	\$538	\$495	\$451	\$454
10	\$530	\$467	\$642	
12	\$639	\$615	\$495	\$624
13	\$362		\$354	
14	\$585	\$595		
18	\$4,757	\$1,487	\$1,584	\$1,421
20	\$1,126	\$913	\$748	
27			\$153	\$162
28	\$977	\$996	\$930	\$900
30	\$558	\$632	\$610	
32	\$317	\$368	\$607	\$573
34	\$802			
35			\$595	\$577
39	\$1,374	\$254		
40		\$316		
41	\$610	\$615		\$462
43	\$830	\$791	\$792	\$713
44	\$576	\$698	\$626	\$652
45		\$337		
46	\$795	\$665	\$702	\$761
47		\$606		
48	\$271	\$296	\$303	\$310
49	\$778	\$987	\$894	
50		\$1,433	\$1,305	\$1,858
51	\$503	\$766		\$655
52	\$809	\$1,069	\$1,519	\$1,426
53	\$444	\$527	\$426	\$404
54	\$359	\$525	\$495	
55	\$525	\$577	\$531	
57		\$900	\$994	\$1,130
58	\$359	\$493	\$617	\$769
62	\$747			
63	\$387	\$867	\$411	
67	\$548	\$450	\$628	\$679
71	\$474	\$515	\$573	
74	\$518			
79		\$1,681	\$1,483	\$989
91	\$20	\$413	\$345	
97		\$1,772	\$1,582	\$1,995
431			\$395	

Description of Calculation

Total HR department costs, divided by total number of district employees (FTEs).

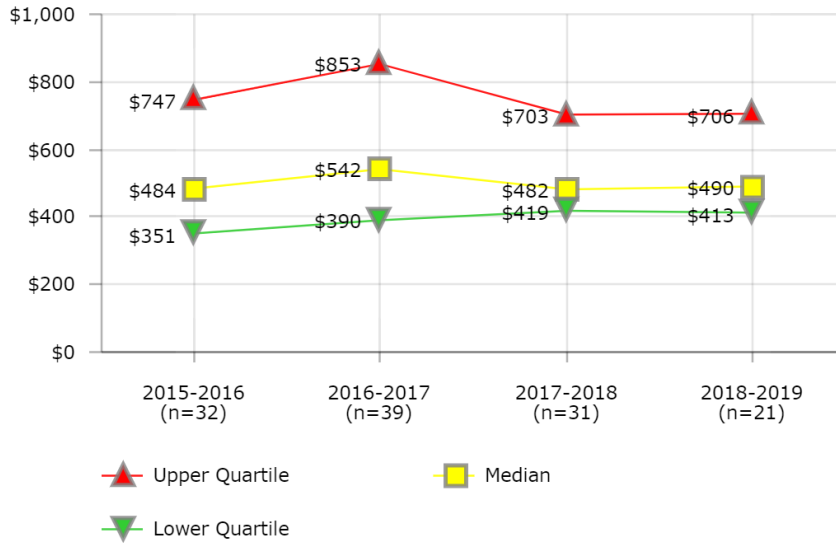
Importance of Measure

This can be help evaluate the size of the budget for the human resources department. Since districts often have different structures and priorities, this indicator should be used in conjunction with other measures that indicate actual performance.

Districts in Best Quartile (2018-2019)

- Clark County School District
- Jefferson County Public Schools (KY)
- Norfolk School District
- Orange County Public School District
- Palm Beach County School District
- Wichita Unified School District

HUMAN RESOURCES HR Cost per \$100K Revenue



Description of Calculation

Total HR department costs, divided by total district operating revenue over \$100,000.

Importance of Measure

This can be help evaluate the size of the budget for the human resources department. Since districts often have different structures and priorities, this indicator should be used in conjunction with other measures that indicate actual performance.

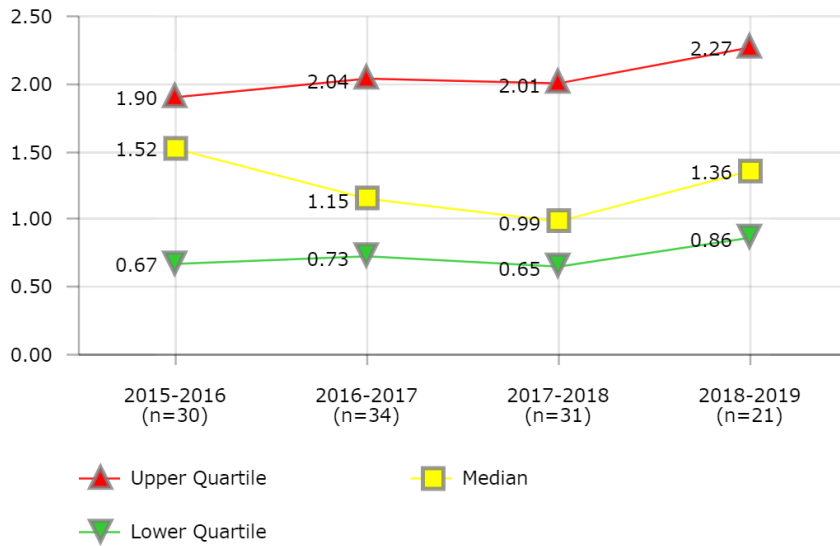
Districts in Best Quartile (2018-2019)

- Jefferson County Public Schools (KY)
- Norfolk School District
- Orange County Public School District
- Palm Beach County School District
- Pittsburgh Public Schools
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
2	\$766	\$728	\$832	
3	\$297	\$510		\$490
4	\$322	\$464	\$357	\$310
7	\$395	\$376	\$453	
8	\$393	\$365	\$340	\$337
9	\$601	\$551	\$478	\$453
10	\$1,136	\$917	\$867	
12	\$583	\$531	\$418	\$507
13	\$436		\$455	
14	\$770			
18		\$1,545	\$1,749	\$1,585
20	\$635	\$539	\$565	
27				\$207
28	\$729	\$738	\$669	
30	\$460	\$524	\$495	
32	\$351	\$376	\$603	\$563
34	\$1,009			
35		\$79	\$482	\$473
37		\$2,198		
39	\$1,340	\$287		
40		\$415		
41	\$785	\$734		\$478
43	\$259	\$481	\$467	\$413
44	\$666	\$817	\$711	\$706
45		\$158		
46	\$602	\$486	\$492	\$532
47		\$853		
48	\$378	\$390	\$389	\$388
49	\$1,112	\$2,118		
50		\$1,339	\$984	\$1,458
51	\$771	\$897		\$840
53		\$606	\$411	\$358
54	\$265		\$304	
55	\$704	\$767	\$703	
57		\$656	\$593	\$692
58	\$195	\$297	\$323	
62	\$351			
63	\$453	\$1,078	\$444	
67	\$375	\$351	\$419	\$440
71	\$508	\$483	\$472	
79		\$1,104	\$1,192	\$788
91	\$26	\$542	\$436	
97	\$177	\$2,698	\$2,368	\$2,952
431		\$273	\$545	

HUMAN RESOURCES

Employee Relations - Discrimination Complaints per 1,000 Employees



District	2015-2016	2016-2017	2017-2018	2018-2019
2	0.82	0.82	1.09	
3		0.48	1.38	0.91
4	0.30	0.30	0.45	1.78
5	1.49		2.26	
7	1.96	3.39	0.86	
8	1.02	0.91	0.99	0.60
9	1.95	1.21	0.85	0.89
10	0.26	0.86	0.67	
12	3.03	2.28	1.24	1.05
13			0.33	
14	1.90	3.26		
18	3.84	1.66	1.86	3.41
20	1.08	1.01	0.46	
27			0.65	0.86
28				3.10
30	1.86	2.04	3.49	2.27
32	0.67	1.00	0.71	
34	5.46			
35		0.87	0.50	0.59
37		3.75		
39	1.55	0.80		
40		0.28		
41	0.34	0.65		
43	1.82			
44	1.70	2.40	2.25	3.17
46	1.89		4.96	4.05
48	0.93	1.85	0.56	0.42
49		0.10		
50		2.73	2.01	2.08
51	1.59	2.73		1.34
52	4.95	1.68	2.70	1.63
53		1.36	0.73	1.36
54	1.39	1.73	2.23	
55	0.52	0.73		
57		5.16	2.06	2.19
62	1.67			
63	2.99		1.29	
67	0.63	0.27	0.75	0.29
71	0.68	0.59	0.52	
79		1.64	1.01	3.99
91	0.41	0.40	1.51	
97	0.30	1.10	0.29	0.29
431		1.24	0.80	

Description of Calculation

Number of complaints/charges of discrimination filed by employees with any governmental or regulatory agency, e.g., Equal Employment Opportunity Commission (EEOC), divided by total number of district employees (FTEs) over 1,000.

Factors that Influence

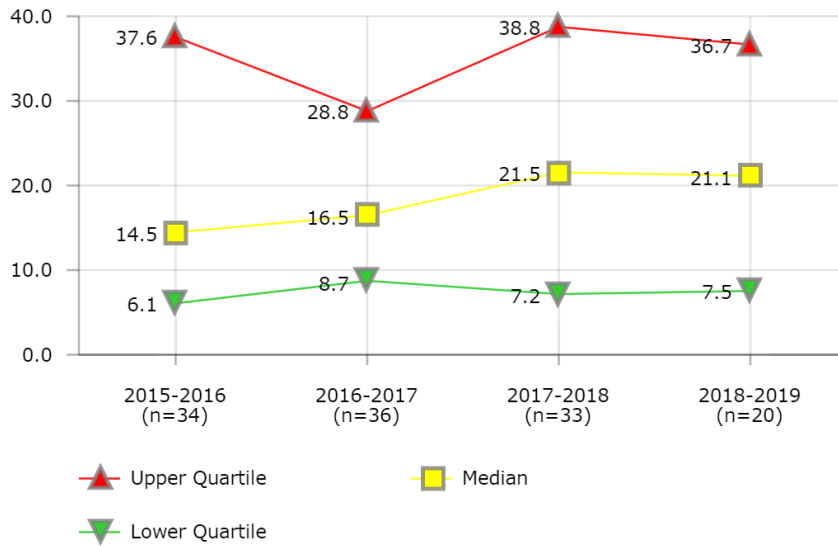
- State and local laws defining discrimination
- Board Policy and organizational protocol for resolution
- Organizational climate
- Quality and level of supervisory training
- Quality and level of EEO Awareness training for all employees
- Effectiveness of supervisors and managers

Districts in Best Quartile (2018-2019)

- Columbus Public Schools
- Fresno Unified School District
- Norfolk School District
- Orange County Public School District
- Palm Beach County School District
- Pinellas County Schools

HUMAN RESOURCES

Employee Relations - Misconduct Investigations per 1,000 Employees



Description of Calculation

Number of misconduct investigations, divided by total number of district employees (FTEs) over 1,000.

Importance of Measure

This measure is an indicator of the effectiveness of hiring and supervisory practices within a district. Administrative costs associated with investigation and resolution diminish resources that could be used more productive educational purposes. High instances of alleged employee misconduct reflect a negative public image on the district.

Factors that Influence

- Organizational attitude and tolerance toward employee misconduct
- Quality of supervision
- Quality of training
- Understanding of expectations
- The hiring processes of the district

Districts in Best Quartile (2018-2019)

- Baltimore City Public Schools
- Cleveland Metropolitan School District
- Des Moines Public Schools
- Fresno Unified School District
- Oklahoma City Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
2	14.2	30.0	40.8	
3	65.1	39.8	31.2	36.4
4	15.2	12.9	21.5	16.9
5	31.3		40.5	
7	12.5	12.2	13.3	
8	11.5	9.0	19.3	22.2
9	7.6	8.4	7.9	9.4
10	7.0	3.1	3.3	
12	6.1	2.9	3.9	4.2
14	0.6	11.1		
18	52.9	41.1	45.3	50.8
20	3.0		2.3	
27			14.5	12.7
28	14.7	17.3	14.2	10.0
30	26.8	23.3	24.6	36.9
32	18.7	14.3	17.0	20.6
34	4.7			
35	37.6	18.9	21.7	21.7
37		2.4		
39	1.4	2.1		
40		18.2		
41	16.9	24.9		
43	49.2			
44	23.3	16.1	35.1	34.9
45		19.3		
46	16.5		4.4	5.7
48	96.7	100.7	98.2	
49	13.2	14.9	19.5	
50		56.2	40.6	51.3
51	4.2	16.8		5.1
52	62.5	57.4	33.2	38.6
53		26.7	36.0	28.8
54	9.8	10.5	7.2	
55	12.2	14.4	38.8	
57		7.6	5.2	5.0
62	5.6			
63	88.7	48.5	51.9	
67	3.5	2.8	1.0	2.1
71	0.8	1.6	1.2	
79		4.9	4.5	
91	54.5	48.3	55.7	
97	61.6	73.7	127.3	121.2
431		27.6	29.8	

Information Technology

Performance metrics in information technology (IT) assess the productivity, cost efficiency, and service levels of the Information Technology Department. The metrics generally fall in the following categories:

1. Network services
2. Computers and devices
3. Help desk and break/fix technical support
4. Systems and software

Network-service measures examine such service-level indicators as **Bandwidth per Student** and **Number of Days Network Usage Exceeds 75% of Capacity** and such cost-efficiency indicators as **Network (WAN) Cost per Student**.

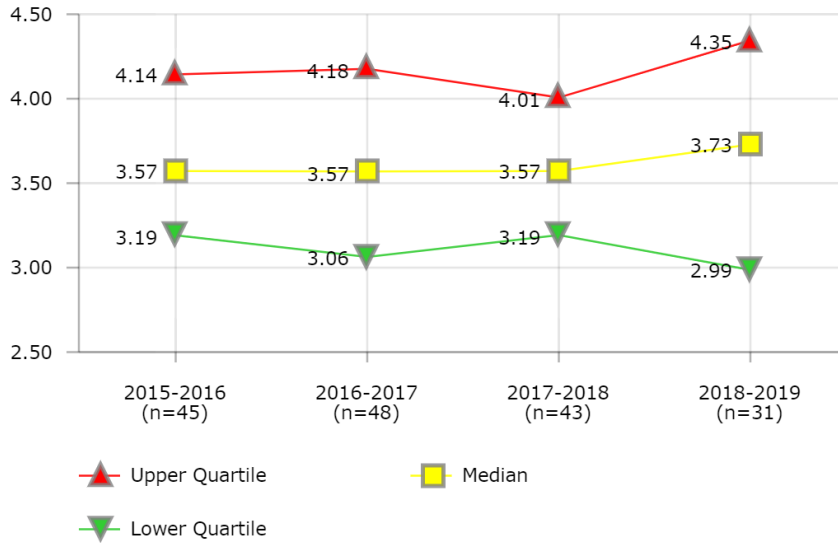
Measures of personal computers and devices include **Average Age of Computers**, which reflect the refresh goals of a district, as well as **Devices per Student**.

The cost effectiveness of technical support services such as the help desk and break/fix support are measured by **Help Desk Staffing Cost per Ticket** and **Break/Fix Staffing Costs per Ticket**.

Finally, the performance of systems and software is measured, in part, by the downtime of these systems, as high rates of interruption are likely to adversely affect district end-users. The operating cost of these systems is measured with **Business Systems Cost per Employee** and **Instructional Systems Cost per Student**.

INFORMATION TECHNOLOGY

Devices - Average Age of Computers



Description of Calculation

The weighted average age of all district computers, i.e., number of one-year-old computers, plus number of two-year-old computers times two, plus number of three-year-old computers times three, plus number of four-year-old-computers times four, plus number of computers five years or older times five.

Importance of Measure

The measure creates an aging index that counts the number of computers in the district by age. Understanding the average age of computers provides data for budget and planning purposes, and impacts break-fix support, supplies, and training. Understanding computer aging will help identify district readiness as software applications become available to staff and students. Developing comprehensive refresh cycles impacts not only the purchasing of equipment but also training cycles.

Many organizations in the private sector use a standard of three years for age of computers before they are replaced. And many school districts refresh their computers over a five-year period to get maximum benefits out of their equipment.

Factors that Influence

- School board and administrative policies and procedures
- Budget development for capital, operational, and categorical funds
- Budget development for schools and department in refresh and computer purchasing
- Budget development in support, supplies, and maintenance.
- Implementation and project management for new software applications in both instructional and operations areas.
- Type of machine (ie: desktop, laptop, netbook, etc.)

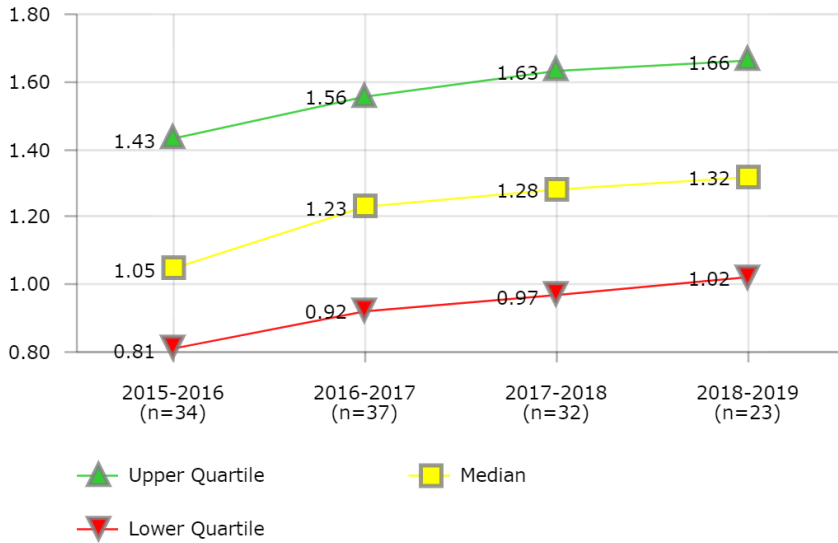
Districts in Best Quartile (2018-2019)

- Columbus Public Schools
- Dallas Independent School District
- Des Moines Public Schools
- Detroit Public Schools
- Milwaukee Public Schools
- Pittsburgh Public Schools
- Shelby County Schools
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1		4.00	4.00	
2	4.36	4.20		
3	3.40	1.88	2.78	3.63
4	3.81	4.28	3.52	2.96
5	3.29			
7	4.30	3.46	3.81	
8	4.13	4.15	4.23	4.23
9	4.64	4.74	4.48	4.63
10	4.48	4.37		
11	3.45	3.94	3.83	3.35
12	3.26	2.61	2.78	2.63
13	2.15	2.55	3.10	4.53
14	4.30	4.72	4.55	4.57
16	4.03	3.99	3.85	3.80
18	3.19	3.09	3.04	2.76
19	4.79		5.23	
20	3.06	3.25	4.01	4.43
21	3.57	4.39	2.96	
23			4.71	
26	3.33	3.29		
27	4.45	3.78		4.35
28		3.13	4.13	4.13
30	3.24	2.77	2.97	2.94
32	2.90	2.96	3.31	3.73
33		3.58		
34	3.64			
35	3.93	3.80	3.57	2.90
37	2.89	2.11		
39	3.00	4.16	3.30	
40	4.13	1.82	3.52	
41	3.19	3.99	3.45	2.96
43	4.06	3.23	3.90	2.99
44	3.00	3.24	3.33	3.34
45		4.21		
46	4.04	3.66	4.06	3.58
47	3.68	4.45		
48	3.38	3.71	3.11	3.94
49	4.72	2.94	3.19	6.00
50		3.41	2.87	2.55
51	5.19	3.21	3.82	3.82
52	4.65	4.70	3.89	3.74
53	4.20	4.70	3.56	3.06
54	3.53	3.83	4.00	
55	2.91	3.56	4.45	
57		2.99	3.43	4.46
58	2.96			
63	2.39	2.50	3.47	
66		3.27		
67	3.39	3.39	3.64	3.34
71	2.89	2.97	3.67	
74	4.14	3.04	2.60	
76				3.06
77			3.24	
79		5.70	5.91	5.69
91	3.08		3.08	
97	3.96	4.86	4.09	4.12

INFORMATION TECHNOLOGY

Devices - Computers per Employee



District	2015-2016	2016-2017	2017-2018	2018-2019
1		1.76		
2	0.51			
3	0.99	1.43	1.33	2.63
4	1.50	1.58	1.60	2.03
5	1.43		2.46	
7	1.18	2.12	2.10	
8	1.04	1.06	1.09	1.08
10	1.10	1.22		
12	1.42	1.72	1.94	1.73
13	1.04		1.03	0.80
14	1.59	1.38	1.23	1.32
18	0.95	1.32	0.97	1.10
20	0.81	0.67	0.94	
27				10.21
28	0.79	0.78		
30	1.33	1.36	1.40	1.40
32	1.11	1.18	0.97	0.98
35	0.57	0.59	0.86	0.81
37	1.02	0.95		
40		2.17		
41	1.05	0.86	0.79	0.69
43		1.57	1.33	1.23
44	1.54	1.24	1.28	1.64
45		1.95		
46	1.45	1.15	1.63	1.37
47		0.88	1.28	
48	1.16	1.56	1.57	1.53
49	0.32	0.35	0.37	
50		1.10	2.01	2.36
51	0.68	0.92	1.02	1.02
52	0.88	0.90	0.88	1.22
53	0.61	0.63	0.79	1.17
54	0.30	0.25	0.25	
55	1.63	1.34	2.33	
57		1.34	4.90	
58	0.75			
63	1.69	1.63		
67	1.26	1.41	1.63	1.66
71	1.81	1.83	1.88	
74	0.83			
79		1.12	1.17	0.96
91	2.01			
97	0.90	1.15	1.27	1.36
431		1.23	1.50	

Description of Calculation

Total number of office-use and teacher-use laptops and desktops, divided by the total number of district employees (FTEs).

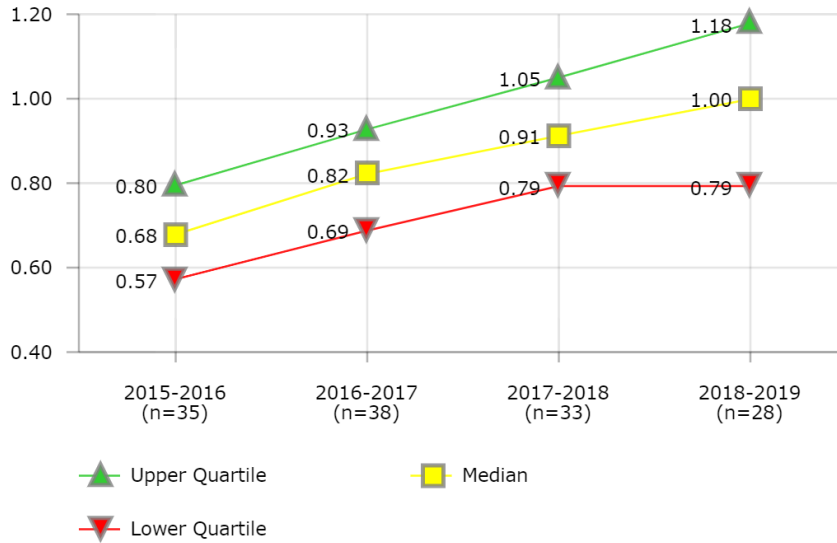
Importance of Measure

Indicates the number of computers used by employees.

Districts in Best Quartile (2018-2019)

- Des Moines Public Schools
- Detroit Public Schools
- Fresno Unified School District
- Norfolk School District
- St. Paul Public Schools
- Wichita Unified School District

INFORMATION TECHNOLOGY
Devices per Student



Description of Calculation

Total number of desktops, laptops and tablets that are for student-only use or mixed-use, divided by total student enrollment.

Importance of Measure

This tracks the movement toward a one-to-one ratio of students to devices.

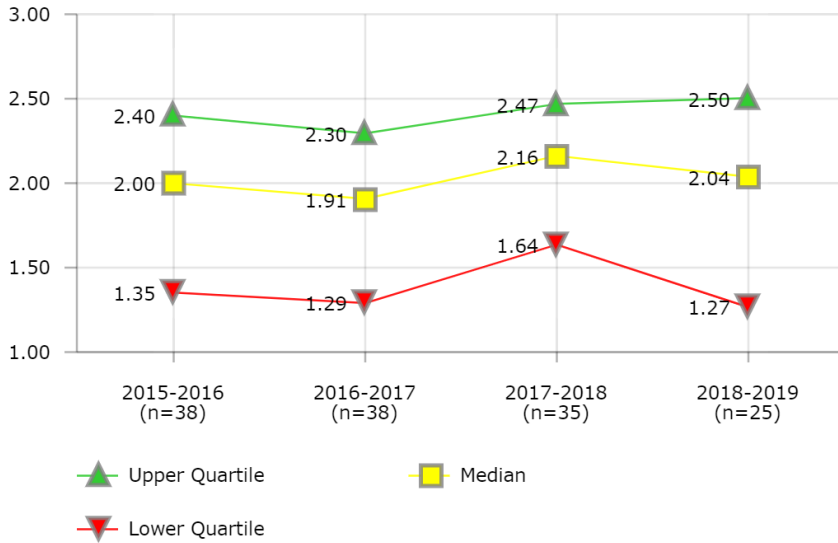
Districts in Best Quartile (2018-2019)

- Clark County School District
- Dallas Independent School District
- Detroit Public Schools
- Milwaukee Public Schools
- Norfolk School District
- San Antonio Independent School District
- St. Paul Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
2	0.80			
3	1.14	1.24	1.22	1.28
4	0.69	0.93	0.97	1.08
5			1.07	
7	0.48	0.65	0.87	
8		0.74	0.86	0.86
9	0.74	0.90	1.05	1.28
10	0.35	0.39		
11				0.26
12	0.75	0.93	1.33	1.15
13	0.61	0.63	0.77	0.84
14	0.98	1.19		
16	0.37		0.87	1.04
18	0.76	1.07	0.95	0.62
19	0.57		1.17	
20	0.97	1.15	1.14	1.16
26		0.84		
27		0.87		1.29
28	0.47	0.87	0.99	1.14
30	0.85	1.04	1.14	1.50
32	0.78	0.69	0.65	0.70
35	0.69	0.82	1.13	1.05
37	0.49	0.77		
40		0.50	0.86	
41	0.61	0.92	0.92	1.47
43	0.63	0.70	0.90	0.87
44	0.80	0.71	0.77	0.92
45		0.73		
46	0.62	0.44	0.74	0.61
47		0.87	0.91	
48	0.73	0.82	0.82	0.94
49	0.68	0.74	0.75	
50			0.79	1.37
51	0.35	0.63	0.93	0.96
53	0.63	0.80	0.90	0.93
54	0.67	0.85	0.99	
55	1.08	1.30		
57		0.40	0.61	0.64
58	0.48			
63	0.88	1.30		
66		0.87		
67	0.70	0.79		1.14
71	0.93	1.20		
74	0.44			
76				1.19
77			1.05	
79		0.30		0.74
91	0.58		0.56	
97	0.59	0.65	0.69	0.74
431			1.72	

INFORMATION TECHNOLOGY

Devices - Advanced Presentation Devices per Teacher



District	2015-2016	2016-2017	2017-2018	2018-2019
1		2.56		
2	1.96	2.04		
3	1.75	1.82	1.81	1.84
4	2.58	2.72	2.67	2.64
5	2.90		2.99	
7	1.71	1.88	1.99	
8	2.22	2.20	2.25	2.24
9	2.62	2.52	2.63	2.45
10	1.17	1.16		
12	2.26	2.23	2.41	2.17
13	2.18		2.35	2.50
14	1.27	1.18	1.40	1.50
18	0.39	1.51	2.16	10.42
20	2.04	1.65	1.64	
23			1.89	
27				0.85
28	1.70	1.75	1.71	1.63
30	1.09	1.29	1.33	1.45
32	0.82	1.13	1.15	1.27
34	2.86			
35	3.04	2.63	2.75	2.55
37	1.77	1.83		
39	2.08	2.04		
40		1.00	1.94	
41	1.70	3.14	2.38	2.63
43	2.42		1.71	0.42
44	2.74	2.82	0.59	3.26
45		0.84		
46	1.45	1.15	1.01	1.25
47		2.30	2.62	
48	2.28	2.39		
49	2.85	2.20	2.76	
50		0.41	0.37	0.86
51	1.84	2.28	2.42	2.42
52	2.08	1.93	2.01	1.81
53	2.40	2.29	2.30	2.30
54	0.30	0.41		
55	2.37	1.69	2.25	
57		1.12	1.04	1.05
58	0.88			
63	1.35	1.43	1.98	
67	2.44	2.16	2.25	2.04
71	1.89	1.85	2.53	
74	0.56			
79				0.76
91	0.54		0.57	
97	2.05	2.31	2.47	2.65
431		4.53	4.52	

Description of Calculation

Total number of advanced presentation devices (video/data projectors, document cameras/digital overheads, interactive whiteboards), divided by the total number of teachers (FTEs).

Importance of Measure

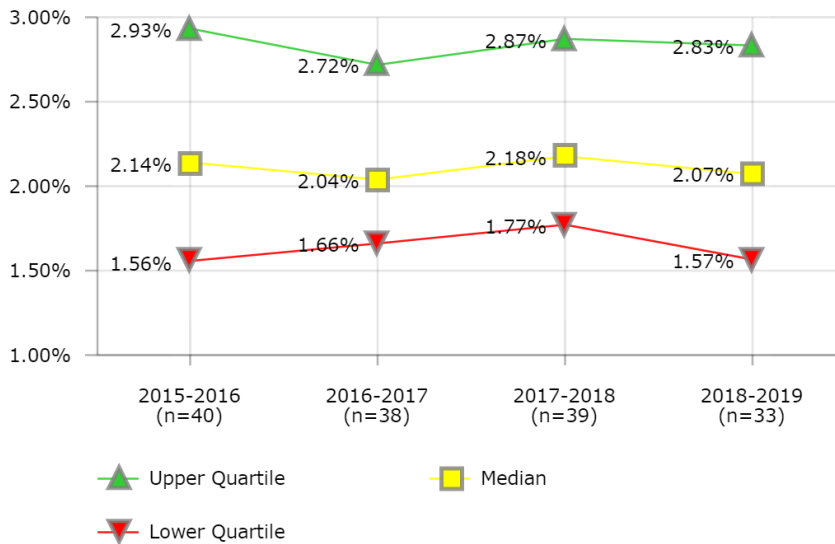
Hi-tech presentation devices are useful for technology-enhanced instruction.

Districts in Best Quartile (2018-2019)

- Broward County Public Schools
- Columbus Public Schools
- Dallas Independent School District
- Duval County Public Schools
- Pinellas County Schools
- Shelby County Schools
- Wichita Unified School District

INFORMATION TECHNOLOGY

IT Spending Percent of District Budget



Description of Calculation

Total IT staffing costs plus total IT hardware, systems and services costs, divided by total district operating expenditures.

Importance of Measure

The measure provides a tool for districts to compare their IT spending per student with other districts. Because each district defines IT slightly differently, it is important to define what is included in the IT budget calculation regardless of the department in which the budget resides.

Keeping IT costs as low as possible and maintaining proper support of academic and operational needs of the district is important in all educational institutions. This measure must be viewed in relationship to other KPIs to strike the correct balance between the district's efficiency and its effective use of technology. If other KPIs such as customer satisfaction, security practices, and ticket resolution are not performing at high levels, low costs associated with IT Spending per Student may indicate an under-resourced operation.

Factors that Influence

- Budget development and staffing
- IT expenditures can be impacted by new enterprise implementations
- The commitment of community for support technology investments in education
- IT Department standards and support model
- Age of technology and application portfolio
- IT maturity of district

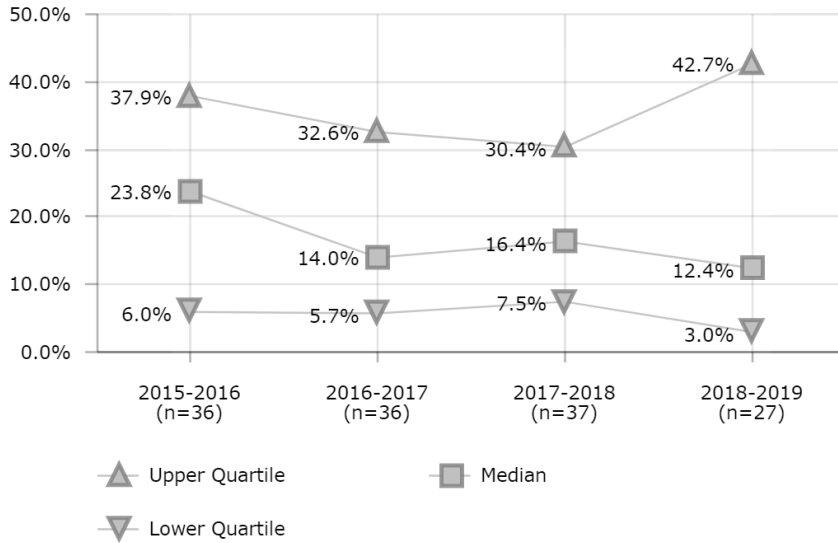
Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Cincinnati Public Schools
- Dallas Independent School District
- Detroit Public Schools
- Duval County Public Schools
- Norfolk School District
- Oakland Unified School District
- Oklahoma City Public Schools
- Orange County Public School District

District	2015-2016	2016-2017	2017-2018	2018-2019
2	1.94%	1.87%		
3	1.04%	1.53%		1.54%
4	2.56%	2.52%	2.47%	2.75%
7	2.32%	2.65%	2.87%	
8	1.52%	1.66%	1.60%	1.57%
9	1.30%	1.41%	1.38%	1.37%
10	1.08%	2.05%		
11	0.97%	1.03%		2.24%
12	3.15%	2.63%	2.78%	2.07%
13	2.90%		2.10%	2.00%
14	4.18%	3.23%	4.26%	4.38%
16	1.87%			1.04%
18		2.18%	2.19%	1.76%
19			0.19%	
20	3.54%	3.85%	3.89%	3.16%
23			3.56%	
27				3.31%
28	1.60%	1.37%	2.01%	
30	2.26%	2.21%	2.33%	2.44%
32	2.20%	3.32%	2.36%	2.13%
34	2.96%			
35	0.96%	0.90%	1.18%	1.19%
37	2.23%	2.40%		
39	3.41%	3.20%	2.98%	
40		2.28%		
41	3.46%	3.31%	3.29%	4.57%
43	1.46%	1.66%	1.77%	1.97%
44	3.19%	2.72%	2.88%	3.32%
45		1.18%		
46	1.67%	1.79%	1.90%	1.57%
47	2.10%	2.84%	2.71%	
48	2.00%	1.52%	4.10%	3.58%
49	3.42%	6.49%		
50		3.06%	1.69%	3.69%
51	4.43%	2.89%	3.90%	3.71%
53		1.12%	2.65%	2.46%
54	1.92%		2.28%	
55	2.39%	1.88%	2.05%	
56	2.35%			1.73%
57		1.91%	0.96%	1.04%
58	0.62%			
61	2.18%		2.83%	2.83%
62	1.49%			1.17%
63	3.07%	1.92%	3.25%	
67	1.35%	2.13%	1.73%	2.14%
71	1.71%	1.80%	1.79%	
77	1.71%		2.02%	1.97%
79		2.03%	1.82%	1.27%
91	2.52%		2.18%	
97	1.60%	2.03%	2.02%	2.08%
101			1.54%	1.73%
431		1.47%	1.49%	
1728			1.80%	1.53%

INFORMATION TECHNOLOGY

IT Spending - Capital Investments



District	2015-2016	2016-2017	2017-2018	2018-2019
1		28.4%	40.8%	
3		13.3%	11.6%	11.8%
5	30.9%	10.3%	9.4%	
7	1.4%	44.3%	11.0%	
8	4.7%	27.5%	43.1%	43.1%
9	5.4%	30.0%	42.2%	45.7%
11	148.9%		23.2%	44.9%
12	39.0%	10.2%	5.6%	5.9%
13	30.7%	56.7%	30.4%	12.4%
14	12.3%	5.7%	7.5%	21.5%
16	3.4%	3.0%	0.2%	0.6%
18			27.2%	17.0%
19	40.7%			
20				99.9%
21	22.7%	6.9%	18.8%	
23			12.8%	
26	37.1%	54.8%		
27		26.7%		1.2%
28	26.9%	68.1%	24.1%	42.7%
30	38.8%	3.7%	3.5%	2.8%
32	28.8%	16.8%	4.2%	6.4%
34	3.8%			
35	68.5%	72.3%	54.7%	68.6%
37	7.8%	7.0%		
39	35.0%	35.1%	24.4%	
41	22.8%	10.9%	13.2%	3.0%
43	24.7%			
44	66.9%	53.9%	50.1%	26.7%
45		4.6%		
47	25.0%	24.1%	32.1%	
48	5.9%	1.8%	75.8%	
49	9.4%	14.7%	16.4%	0.9%
50		3.7%		5.9%
51	1.5%		46.5%	27.6%
52	9.9%		4.0%	20.1%
53		1.3%		0.8%
54	13.0%	38.5%	5.3%	
55	6.0%	2.3%	2.1%	
57		20.8%		0.7%
58	57.2%			
63	4.2%		4.2%	
66		16.2%		
67	57.8%		24.6%	3.0%
71	2.2%	2.7%	7.9%	
74	22.2%	46.0%	20.0%	
76				18.6%
77			71.7%	
79		5.8%	10.5%	11.9%
91	48.6%		16.8%	
97	25.3%	9.6%	9.5%	44.7%
431		8.2%	6.7%	

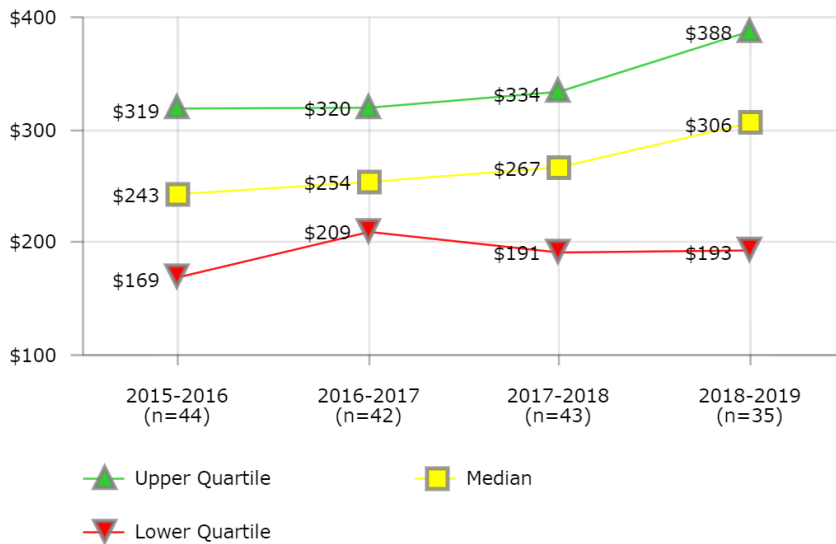
Description of Calculation

Total amount of capital spending in IT as a ratio of (divided by) total IT personnel spending and total IT hardware, systems and services spending.

Importance of Measure

This can help evaluate the level of spending by cost category.

INFORMATION TECHNOLOGY IT Spending per Student



Description of Calculation

Total IT staffing costs plus total IT hardware, systems and services costs, divided by total student enrollment.

Importance of Measure

The measure provides a tool for districts to compare their IT spending per student with other districts. Because each district defines IT slightly differently, it is important to define what is included in the IT budget calculation regardless of the department in which the budget resides.

Keeping IT costs as low as possible and maintaining proper support of academic and operational needs of the district is important in all educational institutions. This measure must be viewed in relationship to other KPIs to strike the correct balance between the district's efficiency and its effective use of technology. If other KPIs such as customer satisfaction, security practices, and ticket resolution are not performing at high levels, low costs associated with IT Spending per Student may indicate an under-resourced operation.

Factors that Influence

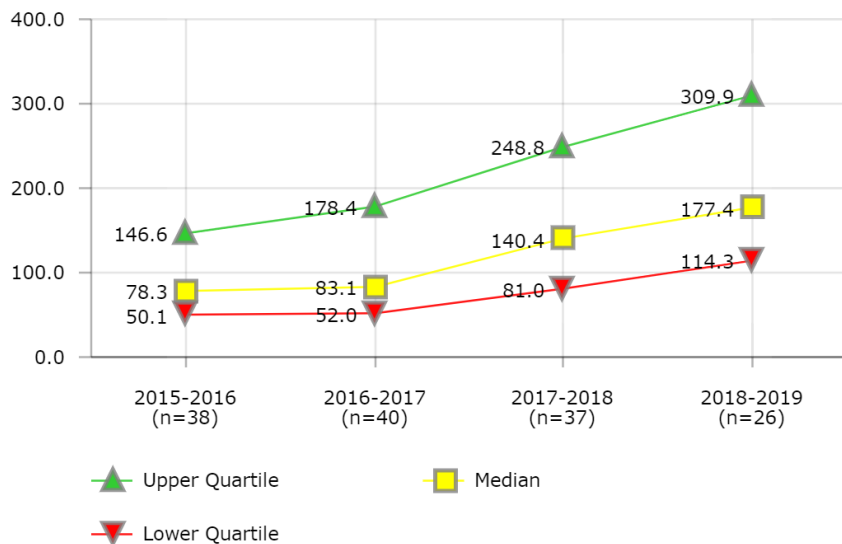
- Budget development and staffing
- IT expenditures can be impacted by new enterprise implementations
- The commitment of community for support technology investments in education
- IT Department standards and support model
- Age of technology and application portfolio
- IT maturity of district

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Atlanta Public Schools
- Cincinnati Public Schools
- Dallas Independent School District
- Des Moines Public Schools
- Detroit Public Schools
- Norfolk School District
- Oklahoma City Public Schools
- Pittsburgh Public Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
2	\$273	\$230		
3	\$279	\$251	\$262	\$260
4	\$306	\$305	\$338	\$343
5			\$229	
7	\$253	\$291	\$317	
8	\$118	\$128	\$126	\$130
9	\$103	\$118	\$114	\$119
10	\$102	\$209		
11				\$328
12	\$559	\$520	\$549	\$406
13	\$253	\$193	\$191	\$193
14	\$391	\$301	\$390	\$454
16	\$132		\$102	\$119
18	\$244	\$268	\$268	\$225
19	\$728		\$49	
20	\$923	\$997		\$828
23			\$428	
26		\$98		
27	\$214	\$320		\$388
28	\$249	\$215	\$311	\$388
30	\$320	\$303	\$318	\$341
32	\$169	\$257	\$185	\$176
34	\$445			
35	\$184	\$183	\$240	\$251
37	\$196	\$242		
39	\$315	\$303	\$334	
40		\$213	\$216	
41	\$360	\$340	\$324	\$459
43	\$435	\$465	\$558	\$616
44	\$277	\$242	\$267	\$307
45		\$370		
46	\$222	\$246	\$257	\$184
47		\$292	\$303	
48	\$175	\$136	\$381	\$352
49	\$366	\$232	\$202	
50		\$376	\$276	\$651
51	\$428	\$322	\$373	\$401
53	\$300	\$144	\$358	\$379
54	\$230	\$236	\$269	
55	\$216	\$177	\$196	
56	\$197			\$176
57	\$318	\$413	\$286	\$336
58	\$101			
61	\$161		\$228	\$323
62	\$153			\$166
63	\$483	\$297	\$545	
66		\$369		
67	\$153	\$246	\$217	\$306
71	\$242	\$274	\$318	
74	\$169			
76				\$263
77	\$134		\$168	\$203
79		\$403	\$387	\$247
91	\$212		\$175	
97	\$163	\$193	\$209	\$218
101			\$148	\$174
431		\$136	\$142	
1728			\$190	\$217

INFORMATION TECHNOLOGY
Network - Bandwidth per Student



District	2015-2016	2016-2017	2017-2018	2018-2019
2	334.1	287.8		
3	266.1	289.8	288.3	544.0
4	78.2	79.1	394.9	403.4
5			223.0	
7	31.0	30.8	63.0	
8	42.0			
9	62.6	62.4	248.8	250.0
10	51.7	51.6		
11				177.4
12	732.3	189.6	188.8	177.4
13	44.3	45.3	70.7	120.2
14	47.7	47.7	48.2	74.6
16	30.9		37.9	97.2
18	0.1	180.8	169.1	168.4
19	143.1		832.9	
20	146.6	290.9	279.1	277.4
26		176.0		
27	58.0	59.6		309.9
28	194.2	192.6	191.8	381.8
30	132.5			
32	56.1	84.2	112.9	114.3
34	160.5			
35	50.1	79.2	79.6	101.9
37	57.7	140.2		
39	46.5	92.7	140.4	
40		22.9		
41	126.4	127.0	127.9	129.2
43	253.8	243.4	26.1	481.2
44	78.4	77.7	154.5	230.9
45		63.7		
46	17.9	48.6	99.3	82.9
47		66.8	81.0	
48	60.1	98.3	96.5	
49	68.2	82.0	82.0	
50		40.4	191.0	192.8
51	269.1	274.2	258.0	532.9
53	98.8	148.5	203.1	153.4
54	42.0	42.7	65.8	
55		274.9	269.0	
57		52.4	52.7	53.7
58	142.4			
63	81.5	41.8	43.5	
66		458.9		
67	141.4	141.4	271.3	281.6
71	90.3	108.7	295.0	
74	207.5			
76				410.5
77			165.9	
79		43.8	86.6	129.5
91	172.8		312.9	
97	57.9	78.2	97.9	98.6
431		134.9	127.6	

Description of Calculation

Total standard available bandwidth (in Mbit/s), divided by total student enrollment.

Importance of Measure

This measure compares similarly situated districts and provides a quantifiable measure toward the goal of providing adequate bandwidth to support the teaching and learning environment. Bandwidth per Student provides a relative measure of the capacity of the district to support computing applications in a manner conducive to teaching, learning and district operations. Some district and student systems are very sensitive to capacity constraints and will not perform well. Students and staff have come to expect certain performance levels based on their experience with network connectivity at home and other places in the community, and schools, if they are to maintain their effectiveness utilizing technology, must provide performance on a par with that available elsewhere.

Factors that Influence

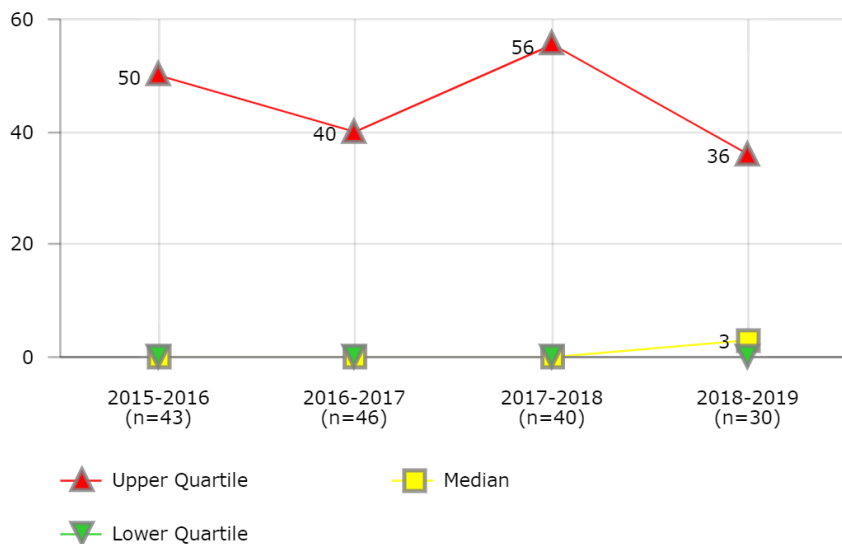
- The number of enterprise network based applications
- The capacity demands of enterprise network based applications
- Fund availability to support network bandwidth costs
- Capacity triggers that provide enough time for proper build out and network upgrades
- Network monitoring systems and tools that allow traffic shaping, prioritization, and application restriction

Districts in Best Quartile (2018-2019)

- Atlanta Public Schools
- Norfolk School District
- Oklahoma City Public Schools
- Pittsburgh Public Schools
- San Antonio Independent School District
- St. Paul Public Schools
- Wichita Unified School District

INFORMATION TECHNOLOGY

Network - Days Usage Exceeded 75% of Capacity



Description of Calculation

The number of days that peak daily internet usage reaches more than 75% of the standard available bandwidth for five (5) minutes or longer.

Importance of Measure

Staying below the metric threshold is critical to application performance and user satisfaction. This metric may also provide justification for network expansion and capacity planning.

Factors that Influence

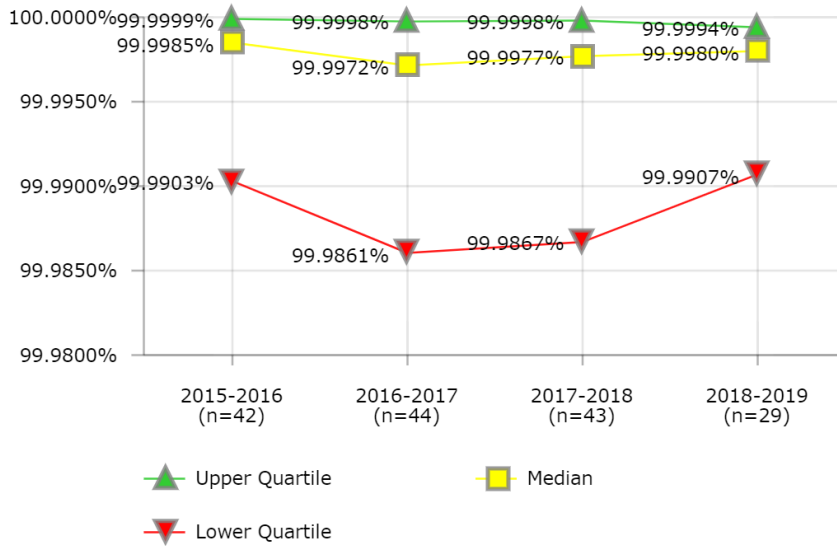
The number of online applications sensitive to latency, digital video, and voice will all impact the amount of bandwidth a district needs. Also, school districts may experience short periods of time with exceptional network demand and large portions of time with plenty of excess capacity.

Districts in Best Quartile (2018-2019)

- Baltimore City Public Schools
- Clark County School District
- Detroit Public Schools
- Los Angeles Unified School District
- Miami-Dade County Public Schools
- Milwaukee Public Schools
- Norfolk School District
- Oklahoma City Public Schools
- Orange County Public School District
- Pittsburgh Public Schools
- San Antonio Independent School District
- St. Paul Public Schools
- Toledo Public Schools
- Wichita Unified School District

District	2015-2016	2016-2017	2017-2018	2018-2019
1			5	
2	0	0		
3	0	0	0	0
4	0	0	0	0
5	26	0		
7	180	180	180	
8	25		3	3
9	144	172	0	0
10		11		
11	0	0	0	0
12		180	180	180
13	162	54	51	53
14	260	180	200	200
16		0		
18	5	0	0	34
19	0		0	
20	12	6	21	36
21	210	210	210	
23			56	
26	0	0		
27	0	0		0
28	0	0		30
30	10	0	0	0
32	0	0	0	0
33		0		
34	25			
35	210	175	175	102
37	20	40		
39	260	0	0	
40	15	0	0	
41	0	0	0	100
43	0	0	0	0
44	0	30	55	10
45		160		
46	0	0	0	0
47	175			
48	201	5	5	0
49	30	12	15	25
50		0	5	0
51	0	7	0	0
52	0	0	300	30
53	150	175	0	9
54	0	36	47	
55	0	0	0	
57		146	175	3
58	0			
63	0	0	0	
66		0		
67	0	10	0	120
71	5	5	0	
74	0	0	100	
76				0
77			0	
79		5		0
91	0		0	
97	50	90	120	200

INFORMATION TECHNOLOGY
Network - WAN Availability



District	2015-2016	2016-2017	2017-2018	2018-2019
1		100.0000%	99.9977%	
2	100.0000%	99.9998%		
3	99.9945%	99.9815%	99.9841%	99.9991%
4	99.9966%	99.9947%	99.9970%	99.9976%
5	99.9994%	99.9990%	99.9998%	
7	99.9968%	99.9965%	99.9993%	
8	99.9903%	99.9970%	99.9925%	99.9925%
9	99.8860%	99.7638%	99.9052%	99.8990%
10		99.8592%		
11	99.9999%	99.9866%	99.9974%	99.9981%
12			99.9715%	99.9315%
13	99.9785%	99.9914%	99.9908%	99.9907%
14	99.9953%	99.9999%	99.9997%	99.9997%
16	99.9693%	99.9995%	99.9998%	99.9997%
18	99.9099%	99.9013%	99.7029%	99.6778%
19	100.0000%		100.0000%	
20	99.9974%	99.9941%	99.9908%	99.9856%
21	100.0000%	100.0000%	100.0000%	
23			99.9970%	
26	99.9991%	99.9995%		
27				99.9994%
28	99.8316%	99.9958%	99.9245%	100.0000%
30	99.9987%	99.9315%	100.0000%	100.0000%
32	99.9999%	100.0000%	99.9966%	99.9988%
33		99.9921%		
34	99.9982%			
35	99.9986%	99.9986%	99.9999%	99.9956%
37	99.9998%	99.9997%		
39	99.5455%	99.4299%	99.7952%	
40	99.9982%	99.9999%	99.9995%	
41	99.9997%		99.9995%	99.9980%
43	99.9996%	99.9995%	99.9890%	99.9985%
44	99.9957%	99.9755%	99.9794%	99.9426%
45		100.0000%		
46	99.9999%	100.0000%	99.9993%	99.9988%
47	99.8135%	99.8645%	99.9836%	
48	99.9973%	99.9874%	99.9867%	99.9969%
49	99.9999%	100.0000%	100.0000%	99.9990%
50		99.6598%		
51	100.0000%	99.9855%	99.9996%	99.9996%
52	99.9800%	99.9969%	99.9909%	99.9968%
53	99.9984%	99.9973%	100.0000%	99.9940%
54		99.9517%	99.9826%	
55	99.9208%	99.9981%	99.9093%	
57		99.9999%	100.0000%	100.0000%
58	99.9997%			
63	100.0000%		100.0000%	
66		99.9995%		
67	99.9652%	99.9980%	99.9973%	99.9842%
71	100.0000%	100.0000%	100.0000%	
74	99.9997%	99.9978%	99.9981%	
76				99.9623%
77			99.9993%	
91	99.9995%		99.9995%	
97	99.9999%	99.9963%	99.9981%	99.9995%

Description of Calculation

Total minutes of all outages on WAN circuits, divided by the total number of WAN circuits.

Importance of Measure

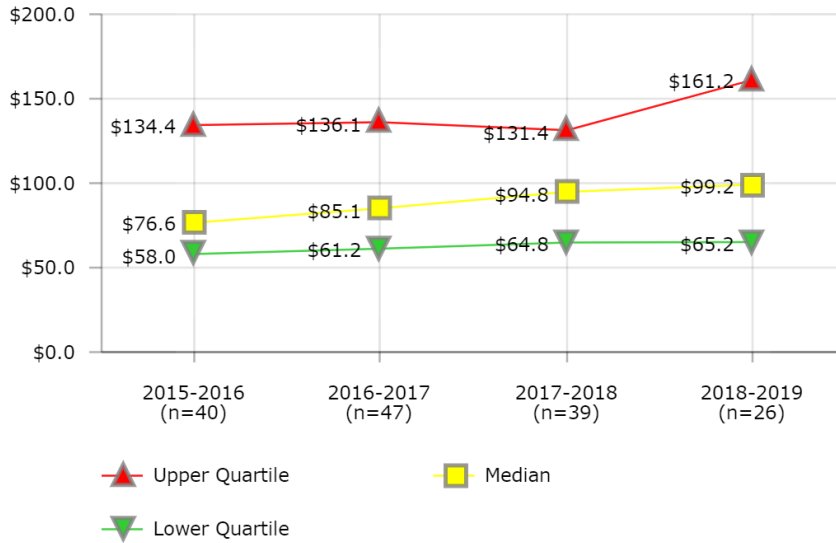
The number of online applications sensitive to latency, digital video, and voice will all impact the amount of bandwidth a district needs.

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Atlanta Public Schools
- Cleveland Metropolitan School District
- Milwaukee Public Schools
- Norfolk School District
- Oklahoma City Public Schools
- Pinellas County Schools
- San Diego Unified School District

INFORMATION TECHNOLOGY

Support - Break/Fix Staffing Cost per Ticket



Description of Calculation

Total personnel costs of Break/ Fix Support (including managers), divided by the total number of tickets/incidents.

Importance of Measure

This measure assesses staffing cost per incident, which may indicate how responsive and how efficient the help desk is in making itself available to its customers. The goal is to improve customer satisfaction through resolving incidents quickly, effectively, and cost efficiently. There are various costs that could be included in this metric such as hardware, software, equipment, supplies, maintenance, training, etc. Staffing cost per ticket was selected because data is easily understood and accessed and salary costs are typically the biggest cost factor in a help desk budget.

Factors that Influence

- Software and systems that can collect and route contact information
- Knowledge management tools available to help desk staff and end users
- Budget development for staffing levels

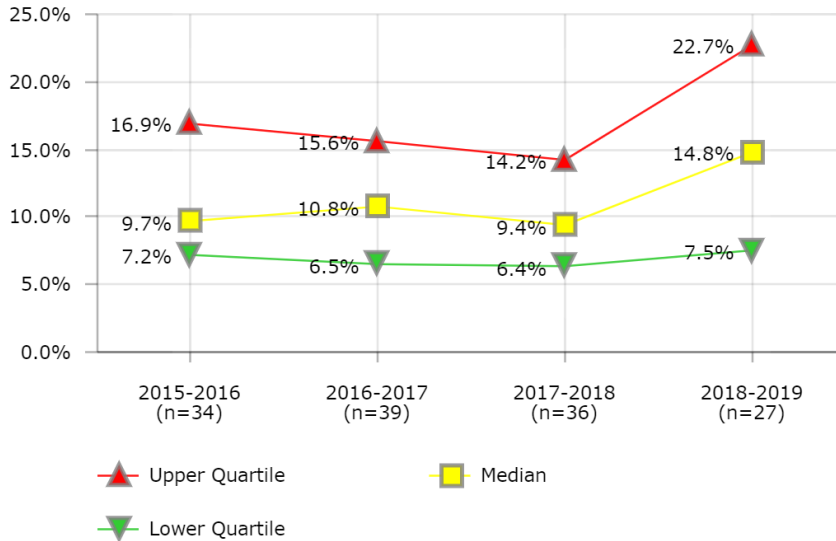
Districts in Best Quartile (2018-2019)

- Broward County Public Schools
- Dallas Independent School District
- Palm Beach County School District
- Pinellas County Schools
- San Antonio Independent School District
- San Diego Unified School District
- Shelby County Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		\$250.4	\$64.8	
2	\$61.0	\$61.2		
3	\$319.8	\$91.9	\$94.8	\$106.7
4	\$105.0	\$104.2	\$106.8	\$161.2
5	\$55.1	\$77.5	\$36.2	
7	\$78.5	\$110.1	\$104.8	
8	\$54.9	\$57.7	\$55.3	\$57.0
9	\$136.0	\$136.1	\$223.4	\$184.7
10	\$63.8	\$46.1		
11		\$263.1	\$258.6	\$101.5
12	\$52.4	\$62.5	\$113.1	\$193.5
13	\$93.1	\$52.5	\$75.8	\$65.2
14	\$225.8	\$94.7	\$184.5	\$192.8
16	\$74.5	\$98.1	\$52.4	\$60.1
18	\$66.7	\$59.7	\$127.4	\$52.4
19	\$92.3			
20		\$995.8		
21	\$233.1	\$199.6	\$168.8	
23			\$39.7	
27	\$87.9	\$115.9		\$93.7
28	\$112.2	\$108.9	\$100.0	
30	\$385.1	\$594.5	\$535.5	\$653.4
32	\$153.6	\$189.2	\$226.3	\$426.2
33		\$207.2		
35	\$72.6	\$102.8	\$95.1	\$94.8
37	\$46.1	\$85.1		
39	\$21.3	\$35.6	\$17.0	
40	\$67.9	\$62.7	\$128.4	
41	\$51.6	\$71.5	\$58.0	\$64.7
43	\$201.1	\$78.1	\$326.8	\$280.3
44	\$249.1	\$426.3	\$976.3	
45		\$35.0		
46	\$49.5	\$83.0	\$82.3	\$81.5
47	\$3.7			
48	\$77.3	\$72.4	\$97.5	\$105.8
49	\$70.5	\$67.3	\$71.9	
50		\$151.9	\$214.5	\$156.3
51	\$435.1	\$50.2		\$83.6
52	\$76.4	\$96.8	\$89.0	\$84.0
53	\$76.8	\$96.4	\$86.0	\$96.8
54	\$132.9	\$66.3	\$60.7	
55	\$19.4	\$79.0	\$72.1	
58	\$67.7			
63	\$52.9	\$45.8	\$50.5	
66		\$509.4		
67	\$61.2	\$57.8	\$77.0	\$109.1
71		\$65.6	\$65.2	
74	\$170.8	\$144.7	\$131.4	
76				\$45.5
79		\$95.4	\$131.2	\$140.0
91	\$115.5		\$86.8	
97		\$0.6	\$10.9	\$12.8
431		\$54.0		

INFORMATION TECHNOLOGY

Support - Help Desk Call Abandonment Rate



District	2015-2016	2016-2017	2017-2018	2018-2019
1		9.5%	6.3%	
2	23.7%	10.1%		
3		18.4%	17.9%	19.3%
4	18.8%	17.1%	12.0%	7.3%
5	7.2%		0.7%	
7	16.9%	15.3%	14.5%	
8	13.8%	10.8%	8.1%	8.1%
9	14.3%	12.4%	8.9%	8.0%
10		15.1%		
11	100.0%	28.3%	7.0%	22.3%
13	8.5%	14.8%	26.6%	26.9%
14	6.0%	5.7%	9.0%	4.8%
16	9.4%	6.5%	21.3%	16.6%
18	2.6%	5.5%	3.6%	7.5%
20	8.7%	11.3%	6.4%	
21	14.0%	8.6%	11.5%	14.8%
23			12.7%	
26	9.9%	62.5%		
27	4.4%			16.6%
28	12.6%	13.4%	12.5%	15.2%
30	3.1%	2.2%	2.3%	50.0%
33		40.2%		
34	10.4%			
35	12.8%	6.2%	7.5%	5.5%
37	20.0%	15.6%		
39	9.5%	8.9%	18.7%	
40	29.4%	26.5%	28.9%	
41	8.8%	10.2%	8.2%	8.8%
43	29.7%	33.5%	24.8%	24.1%
44		0.1%		6.5%
45		12.4%		
46	8.9%	5.5%	4.5%	6.2%
47	9.9%	12.8%	12.5%	
48	6.8%	8.6%	8.8%	7.8%
49				22.7%
50		16.9%	23.1%	36.1%
51	23.9%	20.0%	24.2%	24.2%
52			7.7%	6.5%
53	8.0%	9.3%	13.9%	19.3%
54	8.1%	3.3%	13.3%	
55	4.1%	1.6%	1.3%	
57		13.4%	6.2%	12.3%
58	22.5%			
63	1.4%	1.2%	1.1%	
71		9.0%	5.7%	
76				12.3%
77			9.8%	
97	0.9%	9.8%	10.1%	35.2%

Description of Calculation

Number of abandoned calls to the Help Desk, divided by total number of calls to the Help Desk.

Importance of Measure

This measure assesses the percentage of telephone contacts that are not answered by the service desk staff before the caller disconnects. CAR is an indicator of the staffing level of the service desk relative to the demand for service. The CAR can be used as a management indicator to determine staffing levels to support seasonal needs or during times of system issues (application or network problems). On an annual basis, it is a measurement of the effectiveness of resource management. This measure should be used as a tool to help guide quality improvement processes.

Factors that Influence

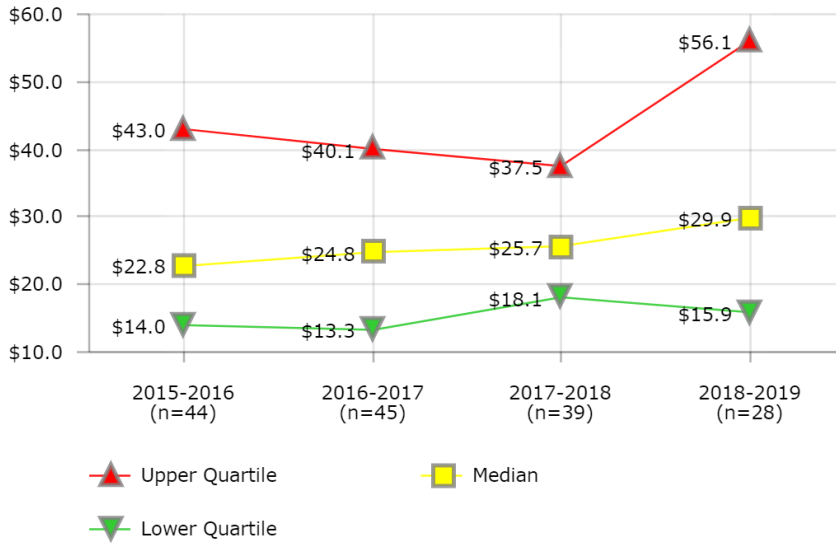
- The Call Abandonment Rate will be influenced by effective supervision to ensure that service desk team members are online to take calls
- A high percentage could indicate low availability caused by inadequate staffing, long call handling times and/or insufficient processes
- Length of time the caller is on hold
- Capacity of the organization to respond to customer support requests
- Proper staffing when implementing district-wide applications, which significantly increase calls
- Automation tools like password reset can reduce number of calls to the help desk and reduce overall call volume
- Increased training of help desk can reduce long handling time freeing up staff to take more calls

Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Baltimore City Public Schools
- Columbus Public Schools
- Duval County Public Schools
- Minneapolis Public Schools
- Shelby County Schools
- Wichita Unified School District

INFORMATION TECHNOLOGY

Support - Help Desk Staffing Cost per Ticket



Description of Calculation

Total personnel costs of the Help Desk (including managers), divided by the total number of support tickets/incidents.

Importance of Measure

This measure assesses staffing cost per incident, which may indicate how responsive and how efficient the help desk is in making itself available to its customers. The goal is to improve customer satisfaction through resolving incidents quickly, effectively, and cost efficiently. There are various costs that could be included in this metric such as hardware, software, equipment, supplies, maintenance, training, etc. Staffing cost per ticket was selected because data is easily understood and accessed and salary costs are typically the biggest cost factor in a help desk budget.

Factors that Influence

- Software and systems that can collect and route contact information
- Automation tools for common help desk issues like password reset can improve performance and reduce costs these numbers should be included in data collection
- Other duties performed by the help desk staff that restrict them from taking calls
- Knowledge management tools available to help desk staff and end users
- Budget development for staffing levels

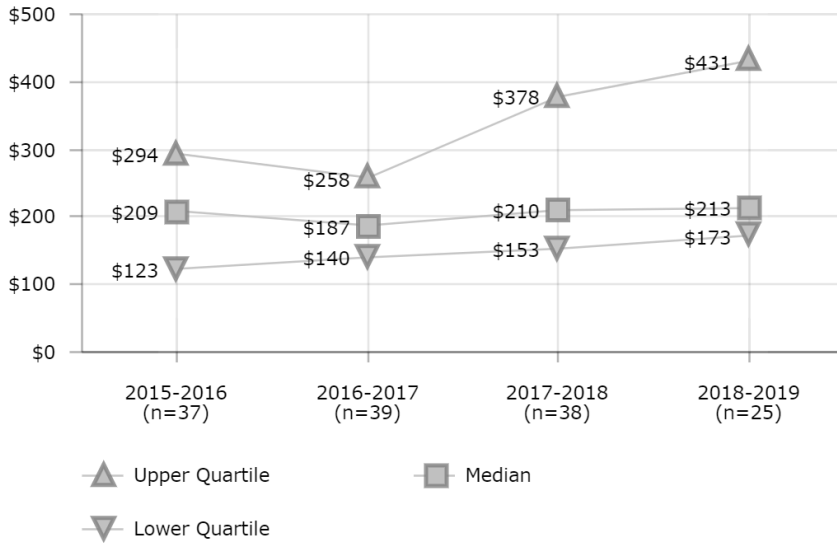
Districts in Best Quartile (2018-2019)

- Albuquerque Public Schools
- Baltimore City Public Schools
- Clark County School District
- Dallas Independent School District
- Pinellas County Schools
- Pittsburgh Public Schools
- Shelby County Schools

District	2015-2016	2016-2017	2017-2018	2018-2019
1		\$9.3	\$6.9	
2	\$5.8	\$13.2		
3	\$24.0	\$40.1	\$40.3	\$27.4
4	\$12.4	\$14.6	\$10.8	\$17.0
5			\$19.0	
7	\$11.3	\$7.8	\$10.3	
8	\$26.4	\$25.6	\$19.9	\$20.5
9	\$13.0	\$18.1	\$18.1	\$12.7
10	\$16.3	\$19.9		
11		\$31.3	\$23.7	\$21.5
12	\$27.2	\$28.5	\$25.7	\$37.5
13	\$30.2	\$49.4	\$67.2	\$71.1
14	\$21.5	\$17.7	\$14.6	\$14.7
16	\$22.8	\$26.7	\$25.9	\$25.7
18	\$22.7	\$26.9	\$19.8	\$11.8
19	\$43.3			
20	\$32.8	\$24.6	\$28.6	
21	\$34.0	\$29.7	\$22.4	
23			\$13.6	
26	\$55.2	\$12.1		
27	\$116.1			\$126.1
28	\$15.9	\$19.7	\$28.3	\$28.4
30	\$42.7	\$27.1	\$33.5	\$41.8
32	\$4.9	\$6.3	\$6.9	\$59.5
34	\$545.2			
35	\$10.5	\$10.7	\$17.5	\$82.0
37	\$38.1	\$24.8		
39	\$10.6	\$9.4	\$18.7	
40	\$109.3	\$93.5	\$126.0	
41	\$17.6	\$13.4	\$10.4	\$7.1
43	\$10.6	\$3.7	\$24.9	\$12.7
44	\$44.8	\$47.1	\$52.6	\$64.2
45		\$11.6		
46	\$13.8	\$13.3	\$24.5	\$9.3
47	\$8.0	\$51.2	\$51.6	
48	\$18.7	\$46.1	\$36.1	\$31.3
49	\$95.2	\$91.0		
50		\$21.2	\$37.5	\$52.8
51	\$348.1	\$34.0		\$49.0
52	\$59.1	\$59.7	\$79.9	\$73.9
53	\$14.2	\$8.5	\$8.9	\$21.1
54	\$1.3	\$1.3		
55	\$31.4	\$32.9	\$29.4	
57		\$80.3		
58	\$24.9			
63	\$19.4	\$18.5	\$19.5	
66		\$75.0		
67	\$15.8	\$21.4	\$32.3	\$40.7
71	\$19.8	\$38.0	\$61.6	
74	\$119.7	\$107.9	\$182.1	
76				\$33.8
77			\$99.1	
79				\$518.8
91	\$92.0		\$30.8	
97	\$17.0	\$40.2	\$27.2	\$11.5

INFORMATION TECHNOLOGY

Systems Cost - Business Systems Cost per Employee



Description of Calculation

Personnel costs of staff for administration, development and support of enterprise business systems, plus annual maintenance fees for all enterprise business systems, plus total outsourced services fees for enterprise business systems, all divided by total number of district FTEs.

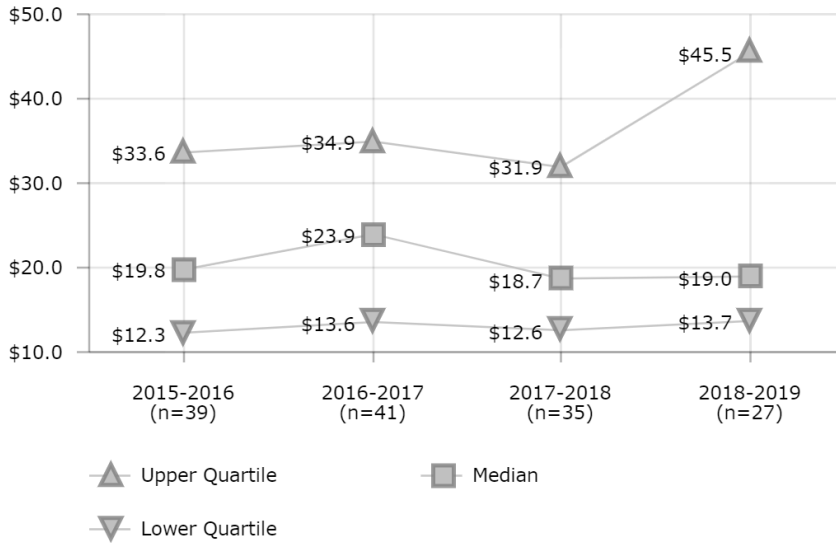
Importance of Measure

Can be used to evaluate total relative cost of systems. This includes recurring costs and maintenance fees only; it does not include capital costs or one-time implementation fees.

District	2015-2016	2016-2017	2017-2018	2018-2019
1		\$220		
2	\$215	\$58		
3	\$375			
4	\$663	\$782	\$825	\$881
5	\$209		\$463	
7	\$163	\$180	\$194	
8	\$219	\$223	\$209	\$213
9	\$230	\$215	\$173	\$195
10	\$46	\$78		
12	\$218	\$144	\$148	\$185
13	\$332		\$361	\$273
14	\$186	\$121	\$136	\$118
18	\$294	\$143	\$841	\$536
20	\$472	\$492	\$248	
23			\$229	
27				\$148
28	\$412	\$258	\$382	\$467
30	\$712	\$702	\$674	\$599
32	\$152	\$140	\$144	\$155
34	\$123			
35	\$166	\$161	\$163	\$153
37	\$240	\$380		
39	\$404	\$322	\$357	
40		\$230	\$367	
41	\$426	\$389	\$174	\$264
43	\$107	\$132	\$133	\$556
44	\$177	\$140	\$170	\$187
45		\$129		
46	\$246	\$238	\$244	\$208
47		\$174	\$236	
48	\$94	\$381	\$472	\$431
49	\$70	\$76	\$82	
50		\$424	\$473	\$173
51	\$691	\$187	\$337	\$351
52	\$106	\$239	\$777	\$420
53	\$134	\$180	\$428	\$206
54	\$228	\$221	\$211	
55	\$117	\$126	\$126	
57		\$390	\$378	\$434
58	\$108			
63	\$196	\$158	\$175	
67	\$180	\$118	\$174	\$273
71	\$254	\$192	\$179	
79		\$192	\$135	\$152
91	\$48		\$42	
97	\$47	\$75	\$84	\$86
431		\$141	\$153	

INFORMATION TECHNOLOGY

Systems Cost - Instructional Systems Cost per Student



Description of Calculation

Personnel costs of staff for administration, development and support of instructional systems plus annual maintenance fees for instructional systems plus total outsourced services fees for instructional systems all divided by total number of students in the district.

Importance of Measure

Can be used to evaluate total relative cost of systems. This includes recurring costs and maintenance fees only; it does not include capital costs or one-time implementation fees.

District	2015-2016	2016-2017	2017-2018	2018-2019
2	\$12.5	\$13.9		
3	\$12.6			
4	\$30.0	\$27.7	\$29.8	\$35.9
5			\$20.3	
7	\$34.6	\$30.0	\$35.7	
8	\$10.9	\$14.9	\$15.8	\$16.3
9	\$12.2	\$13.4	\$18.7	\$13.7
10	\$12.3	\$54.5		
11				\$78.0
12	\$79.4	\$95.8	\$81.2	\$12.8
13	\$27.7	\$24.3	\$19.0	\$19.9
14		\$12.2	\$13.6	\$17.7
16	\$18.1		\$22.3	\$24.1
18	\$5.6	\$13.9	\$15.8	\$17.3
19	\$37.3			
20	\$57.6	\$66.2	\$81.9	\$58.5
26		\$11.2		
27	\$25.2	\$48.8		\$55.5
28	\$5.0	\$7.5		\$4.1
30	\$27.9	\$14.1	\$14.3	\$16.4
32	\$33.6	\$41.0	\$44.7	\$45.5
34	\$30.0			
35	\$12.7	\$12.5	\$12.6	\$12.6
37	\$31.7	\$20.6		
39	\$34.1	\$34.9	\$40.6	
40		\$37.4	\$27.9	
41	\$31.2	\$37.0	\$41.0	\$27.8
43	\$68.8	\$51.3	\$53.6	\$110.1
44	\$8.1	\$13.0	\$10.9	\$16.3
45		\$24.7		
46	\$43.0	\$44.2	\$7.4	\$6.8
47		\$6.4	\$5.7	
48	\$17.4	\$33.0		
49	\$10.7	\$10.9	\$10.9	
50		\$16.3	\$6.7	\$2.5
51	\$105.8	\$82.2		\$9.0
53	\$6.7	\$13.6	\$79.5	\$101.9
54	\$11.7	\$9.8	\$10.3	
55	\$11.6	\$27.9	\$28.6	
57	\$25.3	\$26.7	\$28.3	\$31.0
58	\$13.3			
63	\$29.1	\$23.9	\$31.9	
66		\$25.3		
67	\$19.8	\$11.2	\$12.1	\$16.4
71	\$17.6	\$14.4	\$15.0	
74	\$37.3			
76				\$58.1
77			\$13.6	
79		\$27.0	\$24.2	\$36.1
91	\$15.3		\$9.7	
97	\$17.2	\$17.0	\$18.4	\$19.0
431		\$15.7	\$12.6	

COLUMBUS HUMAN RESOURCES REVIEW



Review of the Human Resources Program of the Columbus City Schools

Spring 2020

Dr. Talisa Dixon, Superintendent of the Columbus City Schools (CCS), requested that the Council of the Great City Schools (CGCS) provide a high-level management review of the school district's Office of Human Resources. Specifically, she requested that the Council¹ --

- Review, evaluate, and comment on the organization, management, use of technology, training, and operational procedures of the office.
- Identify opportunities to improve existing processes and internal controls within the office and determine what progress the district had made in implementing the recommendations from a previous Human Resources review conducted by the Council.
- Develop recommendations that would help the Office of Human Resources (OHR) achieve greater managerial effectiveness, operational efficiency, and enhance its strategic value.

In response to this request, the Council assembled a Strategic Support Team (the team) of senior managers with extensive experience in human resources and operations from other major urban city school systems across the country. The team was composed of the following individuals. (Attachment A provides brief biographical sketches of team members.)

Robert Carlson, Project Director
Director, Management Services
Council of the Great City Schools (Washington, D.C.)

David Palmer, Principal Investigator
Deputy Director (Retired)
Los Angeles Unified School District (California)

Paul Idsvoog
Chief of Human Resources and Labor Relations
Fresno Unified School District (California)

¹ The Council has conducted over 320 organizational, instructional, management, and operational reviews in over 65 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.)

Shannon Krysl
Chief Human Resources Officer
Wichita Public Schools (Kansas)

June Taylor
Chief Human Resources Officer
Denver Public Schools (Colorado)

Lori Ward
Chief Talent Officer
Cleveland Metropolitan School District (Ohio)

The team reviewed documents provided by the district² during a four-day site visit to Columbus, Ohio, on March 1-4, 2020. 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 the Chief Human Resources Officer, Mira Wright, 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 observe operations, 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 Human Resources Officer 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 and recommendations that have been designed by the team to help improve the operational efficiency and effectiveness of the Columbus City Schools Office of Human Resources.

Prior Office of Human Resources Review

This review was the second time the Council has been requested by the district to examine the Office of Human Resources (the office). In 2001, the Council, in collaboration with the Broad Foundation,⁴ conducted a review of the office. That report resulted in approximately 20 findings

² A list of needed background material, data, and documents were requested weeks in advance of the onsite visit. The team started receiving materials the day it arrived onsite.

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 teams 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 See: <https://broadfoundation.org/>.

involving areas of concern, lack of best practices in organizational design and staffing, workflow, hiring processes, technology, management and communications, operations, and labor relations. The review provided 33 recommendations associated with restructuring, reengineering, and rebuilding the office to improve effectiveness, efficiency, service delivery, and the office's strategic value to the district.

Although the office has made *some* progress since the previous review, the current team identified multiple areas that still needed to be addressed. Attachment E provides the findings and recommendations from the 2001 review. Yellow highlights in the attachment identify conditions that still exist in some form today.

This review also identified current practices that require attention. The recommendations provided in this review and in the 2001 review can be used as a roadmap to implement changes that would enhance the value of the Office of Human Resources in assisting the Columbus City Schools in meeting its mission and strategic goals.

Columbus City Schools

The Columbus City Schools, the largest school district in Ohio, serves the 14th most populous city in the nation (2018 estimated).⁵ The Columbus City Schools (CCS) operates 113 schools and centers, covering a geographic area of 116 square miles. The district serves a diverse student population of approximately 49,200 students,⁶ supported by nearly 9,000 employees (7,675 FTEs), of which approximately 3,900 are teachers.⁷ Exhibit 1 below shows 11 years of enrollment history, and the projected enrollment through FY2025.⁸

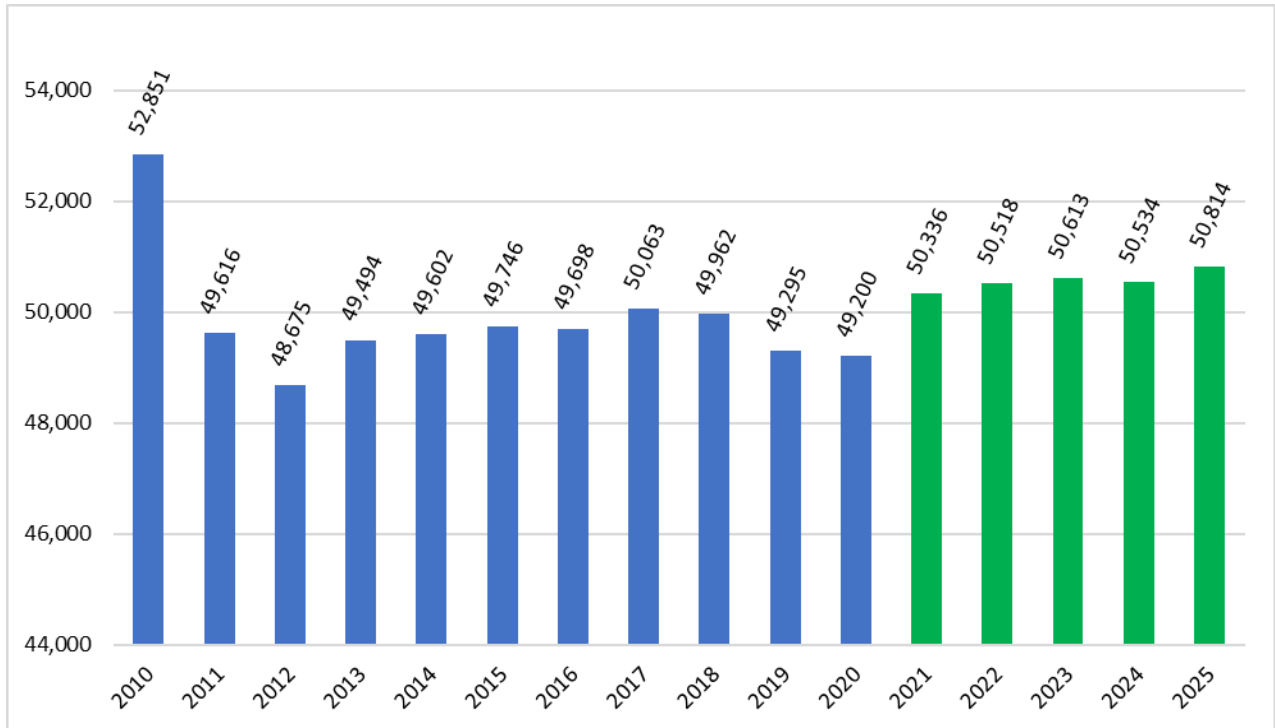
⁵ Source: <https://www.dispatch.com/news/20180524/columbus-retains-position-as-14th-largest-city-for-now>.

⁶ Enrollment at the time of our site visit. See: <http://ccsdashboard.eastus.cloudapp.azure.com/viewer/content/dashboard.html>.

⁷ Source: FY19 Comprehensive Annual Financial Report at: <https://www.ccsos.us/site/handlers/filedownload.ashx?moduleinstanceid=14140&dataid=19857&FileName=2019.PDF>.

⁸ Enrollment projection data was prepared in June 2015 by an outside consultant.

Exhibit 1. Columbus City Schools Enrollment History and Projections



Source: CGCS, Using Data from the CCS FY19 Comprehensive Annual Financial Report, and CCS Web Pages

The Board of Education of the Columbus City Schools governs the district and is responsible for policymaking and oversight, as determined by the general laws of the State of Ohio. The board is comprised of seven members who are elected for overlapping four-year terms.⁹ The Superintendent of Schools, appointed by the board for a maximum term of five years,¹⁰ is the executive officer of the district, who is responsible to the board for the efficient and effective management and operation of the school system and its resources.

The CCS Mission reads: *Each student is highly-educated, prepared for leadership and service, and empowered for success as a citizen in a global community*, and the CCS Vision reads: *A world-class model of public education that prepares members of our communities to reach their full potential.*¹¹

The district’s total expenditure budget for FY20 was \$1.58 billion.¹² The Columbus City Schools’ revenue is derived from a combination of local resources (48 percent of total revenue),

⁹ *Ibid.*

¹⁰ *Ibid.*

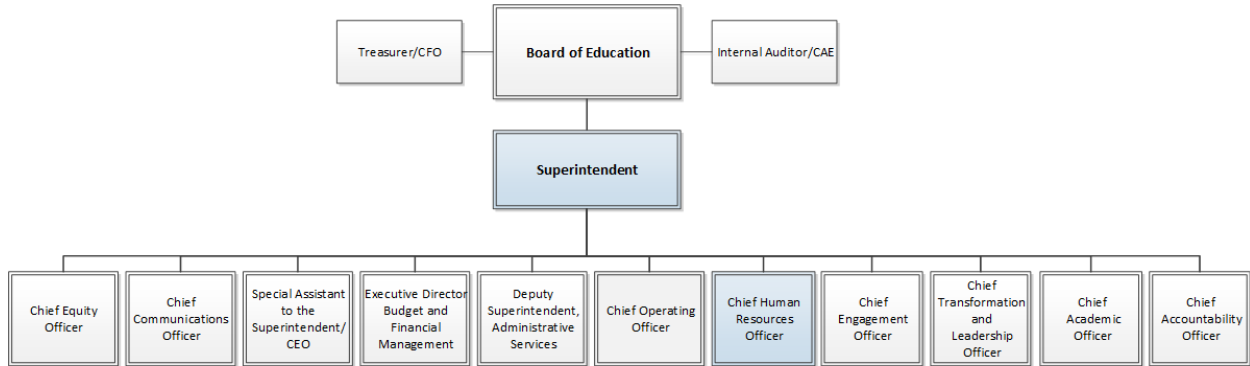
¹¹ Source: <https://www.ccssoh.us/domain/154>.

¹² Source: <https://columbuschools.finance.socrata.com/#!/dashboard>.

state resources (38 percent of total revenue), federal resources (9 percent of total revenue), and other non-tax revenues (4 percent of total revenue).¹³

The superintendent is responsible for the competent administration of the district and its resources. Exhibit 2 below displays the current organizational structure of the Office of the Superintendent and her eleven direct reports. As required by state statute, the Treasurer/CFO and Internal Auditor/CAE positions are direct reports to the Board of Education.

Exhibit 2. Office of the Superintendent Organizational Chart



Source: CGCS, Using Data Provided by the Columbus City Schools

Office of Human Resources

The Chief Human Resources Officer (CHRO) leads the Office of Human Resources and has primary authority and accountability for all district human resources functions, including succession planning, organizational and performance initiatives, and change management. The CHRO is also responsible for developing short and long-range goals and objectives; developing plans to recruit, retain, and evaluate a high-quality workforce; maintain competitive and equitable classification and compensation plans; assess current human resources operating processes, and develop a transformational plan for HR to improve organizational effectiveness and customer satisfaction.¹⁴

The OHR Mission reads: *Columbus City School’s Office of Human Resources seeks to lead, support, and partner to develop a culture that thrives on individual and organizational productivity and accountability, continuous improvement, diversity, and exceptional service.*

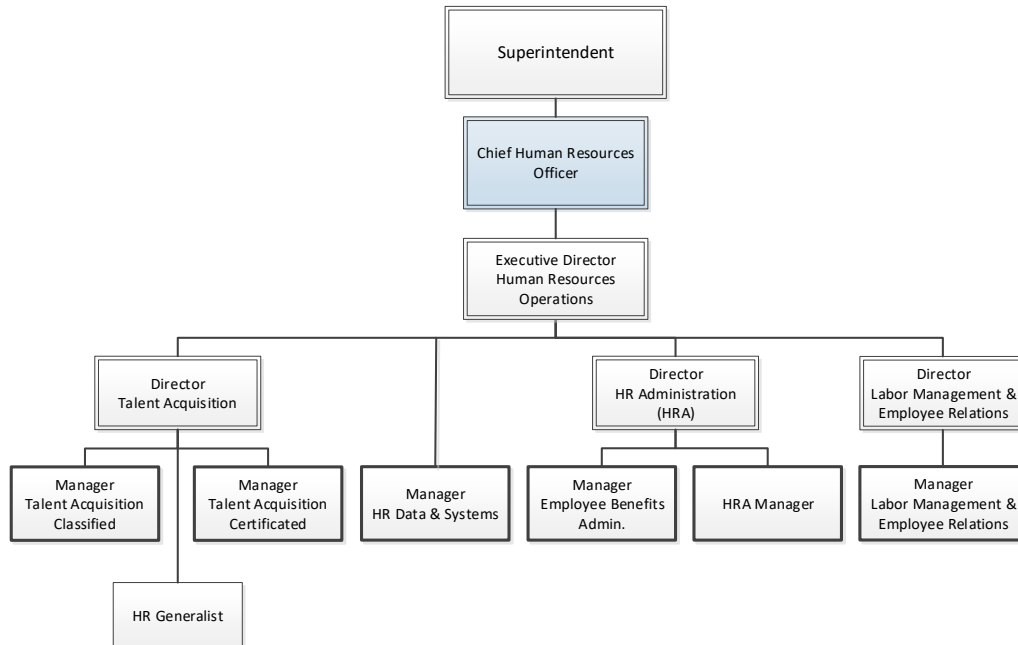
Under the current organizational framework, the CHRO had only one direct line report, the Executive Director, Human Resources Operations. A one-to-one reporting relationship is generally

¹³ Source: <http://education.ohio.gov/Topics/Finance-and-Funding/School-Payment-Reports/District-Profile-Reports/FY2019-District-Profile-Report>.

¹⁴ Source: CCS Job Posting – Chief Human Resources Officer, created May 2019.

recognized as a poor use of resources, funds, and an example of bloated staffing layers.¹⁵ Exhibit 4 below presents an overview of the Office’s organizational structure and direct reports to the Executive Director and Directors.

Exhibit 4. Office of Human Resources Organizational Chart



Source: CGCS, Using Data Provided by the Columbus City Schools

The Office of Human Resources’ core functions include timely recruitment, selection, and onboarding of teachers, administrators, and support staff. The office is also responsible for position classification and compensation;¹⁶ labor management and employee relations; employee discipline; maintaining personnel records; employee benefits; worker compensation; substitute management; processing leaves, grievances, and internal transfers; and the office’s technology systems. Lastly, the office is responsible for transition services for exiting employee separation, resignation, and retirement.

The Chief Human Resources Officer is responsible for HR staffing and budgeting. The office was staffed when the team visited with 37 FTE positions and 14 part time positions.¹⁷ The FY20 office budget was \$5,132,999, which was 0.33 percent of the district’s total expenditure budget. Exhibit 5 below displays an Office of Human Resources budget history.

¹⁵ The team was told that due to anticipated retirement, some HR leadership changes may occur in the next fiscal year.

¹⁶ At the time of this review, this function was not staffed. Some job classification and maintenance is the responsibility of the City of Columbus Civil Service Commission, which is detailed later in this report.

¹⁷ Two (2) part time positions are funded at .7 FTE. The remaining part time positions are on “requisitions” and not considered permanent staff.

Exhibit 5. Office of Human Resources Budget Data

Expenditures	FY 2015		FY 2016		FY 2017		FY 2018		FY 2019		FY 2020
	Revised Budget	Actual	Revised Budget	Actual	Revised Budget	Actual	Revised Budget	Actual	Revised Budget	Actual	Revised Budget
Human Resources											
Salary & Wages	2,382,297	2,429,284	2,484,054	2,529,282	2,636,178	2,721,368	2,718,460	2,610,317	2,406,498	2,433,783	2,497,232
Fringe Benefits	1,177,178	1,131,871	1,172,186	1,086,256	1,121,016	1,184,791	1,222,675	1,151,958	1,252,888	1,154,128	1,234,014
Purchased Services	363,035	253,142	497,315	362,700	591,608	348,941	475,971	320,404	474,010	349,462	566,383
Supplies	15,764	11,142	47,375	14,468	155,766	91,531	217,402	186,236	168,407	164,031	174,687
Capital Outlay	18,537	10,094	30,270	18,202	12,814	12,185	19,322	17,041	25,358	20,786	30,573
Other	310	310	1,215	1,015	850	745	500	125	950	824	2,325
Total Human Resources	3,957,122	3,835,842	4,232,415	4,011,924	4,518,232	4,359,561	4,654,330	4,286,082	4,328,112	4,123,014	4,505,214
Employee Relations											
Salary & Wages	3,712,515	3,165,638	904,005	320,750	22,500	22,500	-	-	-	5,338	-
Fringe Benefits	851,140	635,836	303,475	126,804	349,541	92,970	190,123	69,322	283,683	59,546	410,028
Purchased Services	165,161	157,765	232,943	165,861	217,152	154,336	206,386	163,762	200,671	167,411	217,757
Supplies	-	-	-	-	-	-	-	-	-	-	-
Total Employee Relations	4,728,816	3,959,239	1,440,423	613,415	589,192	269,806	396,508	233,084	484,354	232,294	627,785
Grand Total	8,685,938	7,795,081	5,672,838	4,625,339	5,107,424	4,629,367	5,050,838	4,519,166	4,812,465	4,355,308	5,132,999

Source: CGCS from Data Provided by the Columbus City Schools

Findings

The findings of the Council’s Strategic Support Team are organized into four general areas: Commendations, Leadership and Management, Organization, and Operations. These findings are followed by a set of related recommendations.¹⁸

Commendations

- The request for this review was evidence that the district’s senior leadership recognized that talent acquisition, development, and the retention of human capital are critical factors in the role that the Office of Human Resources had in the district’s ability to meet its strategic goals.
- The Office of Human Resources reported directly to the Superintendent and was positioned to play a strong strategic role (if it has the collective will and ability to do so) in district improvement.
- Principals indicated a high-level of HR-service satisfaction with the employee benefits team.

¹⁸ 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.

- The team noted that the OHR scored in the “best quartile” rankings on multiple 2017-2018 CGCS *Managing for Results*¹⁹ Human Resources Key Performance Indicators (KPI).²⁰ Exhibit 6 below shows the areas where OHR had best quartile rankings. Of note were the *Teacher Retention* percentages.

Exhibit 6. Best Quartile Ranking of CCSD Key Performance Indicators

2017-2018 Key Performance Indicators Human Resources	Columbus City Schools	CGCS Ohio Districts Median	CGCS National Median
Employee Relations - Discrimination Complaints Per 1,000 Employees	0.4999	0.7542	0.9854
Employee Separation Rate	9.94%	9.86%	12.62%
Employee Separation Rate - Non-School Non-Exempt Staff	4.30%	8.82%	11.91%
Substitute Placements With A BA/BS Or Higher	100%	100%	66.27%
Teacher Retention - Remaining After 1 Year	84.87%	81.34%	74.39%
Teacher Retention - Remaining After 2 Years	75.00%	75.33%	66.83%
Teacher Retention - Remaining After 3 Years	72.81%	72.01%	57.47%
Teacher Retention - Remaining After 4 Years	69.93%	60.42%	50.80%
Teacher Retention - Remaining After 5 Years	65.20%	55.10%	43.13%

Source: CGCS KPI Project

- The team found many OHR staff to be passionate and caring about the work they do, and very knowledgeable about the nuances of various employee contracts and agreements.
- Several OHR staff members interviewed demonstrated resilience and a commitment to continuous improvement. This core can be a foundation to build upon.

Leadership and Management

- Turnover (11 changes in the past 17 years) and instability at the top level of management of OHR has negatively affected the office’s ability to set a cohesive direction, and it contributed to many of the conditions described in these findings.
- The OHR defined itself as a transactionally oriented personnel office that was focused on HR maintenance tasks, rather than a strategic, forward-thinking HR office focused on customer service, organizational development, and capacity-building among the people who work within the office or the district. To illustrate, the team --

¹⁹ 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. The most current report, 2017-2018, was released in October 2019.

²⁰ A key performance indicator (KPI) is a type of performance measurement.

- Found a noticeable lack of any holistic approach to core HR functions, including recruitment; and
- Questioned the “value add,” “return on investment,” or “cost-benefit” the OHR brought to the district.
- The Council team found few office priorities or strategic pathways that embraced or articulated clear objectives and direction to support the School Board and Superintendent’s Strategic Plan, goals, and priorities.²¹ The team --
 - Found little evidence that HR staff had knowledge of or supported the goals, objectives, or priorities of the 2018-2023 CCS Strategic Plan;²²
 - Questioned if the right people with the right skill sets were in the right positions of this mission-critical function;
 - Heard minimal reference of a vision of what the 21st century K-12 school district HR office should look like, and the steps needed to implement the vision;
 - Saw that the office was focused more on long-term and aspirational issues rather than on short and intermediate system and process improvements;
 - Noticed a significant lack of customer service focus, both outwardly and inwardly;
 - Heard limited articulation of any sense of urgency, deadlines, or time frames for improvement;
 - Found a lack of clarity as to who was responsible for identifying and prioritizing short and long-term goals and objectives that were needed to be undertaken, and what management tools or methodologies were required for implementation;
 - There was a lack of appropriate management systems in place to provide necessary course corrections that would move the office forward. To illustrate --
 - Actionable plans with roadmaps on how to implement strategic priorities, measure these priorities, and report on progress in attaining these priorities were generally absent;

²¹ See:

<https://www.ccssoh.us/cms/lib/OH01913306/Centricity/Domain/174/Final%20Draft%20Five%20Year%20Strategic%20Plan.9.12.18.pdf>.

²² Although the team was provided the document, *Human Resources Strategic Goals & Priorities 2019-2020*, it appeared that the document was created on or about March 2, 2020, and intended as “informational” for the team.

- Office-identified initiatives, business-case justifications with benchmarks, performance measures, accountabilities, or the use of industry analytics and metrics rarely existed;
 - The OHR lacked formal internal training programs to develop the management, leadership, cross-functional team building, or technical competencies of its employees, or its new employees in particular; and
 - There was a lack of collaboration, shared ownership, or collective accountability for developing common office goals and strategies.
- The team recognizes and appreciates the Board of Education’s fiduciary responsibilities and hiring authority. However, the current Board policy²³ requiring *prior* Board approval may hinder staff hiring and expeditious onboarding. As a result --
 - Current policy prevented CCS HR staff from offering early contracts to top teacher candidates, thereby frequently losing the best and the brightest applicants to other districts,²⁴ and
 - Current policy required that the Board review and approve every hire, including the backfilling of *existing funded vacant positions*.
 - The OHR, based on an internal study of potential cost savings, did not procure a stop/loss policy on health plan claims.
 - There was a lack of due diligence and internal controls that subjected the district to vulnerabilities to unnecessary risk and liability. Preventive or corrective action was not always taken to avoid new or reoccurring worker compensation injuries. For example --
 - The team was told that more than \$800,000 in similar worker compensation claims occurred in the same bus parking location. The hazardous conditions existing in that bus parking location were still not mitigated at the time of the team’s site visit; and
 - It was unclear if there was a formalized process or dedicated department charged with ensuring potential risks to the district were identified and corrected, that training on new equipment was provided before use, and that retraining occurred before returning an employee to work following a worker compensation leave.

²³ See Board Policy sections 1520, 3120, 4120 at:
<https://go.boarddocs.com/oh/columbus/Board.nsf/Public?open&id=policies>.

²⁴ Early contracts would be written as “conditional” awaiting background and other required clearances and verifications.

- The under- or non-utilization of data to drive decision making contributed to many of the current conditions identified in this management letter. To illustrate --
 - Although the office submitted data into the CGCS annual KPI survey, *Managing for Results*, the team found little evidence that any data was used to measure performance levels of the office and its subunits, to hold staff accountable, or to identify positive and negative trending, training opportunities, and goal setting;
 - There was no HR data dashboard available to provide information on such areas as current vacancies to help manage the business of HR;
 - The district nor the OHR had considered alternatives to its current delivery methods, such as outsourcing workers compensation, leave of absence administration, or substitute placement management;
 - There was a lack of trend analysis used involving employee investigations and complaints that could be used to educate supervisors and managers on prevention approaches and techniques; and
 - The office had not developed persuasive business case justifications that demonstrated a focus on process improvement(s), improved system integration, or a return on investment (ROI) for additional HR staff it had requested.
- The team found few plans to perform internal and external customer satisfaction surveys or to utilize customer focus groups to--
 - Better understand customers' needs;
 - Measure the degree of customer satisfaction with services provided or received; and
 - Leverage survey and focus group data to initiate needed change, establish future priorities, and design training opportunities.
- There was a lack of communication channels up-and-down and side-to-side within and between offices. The team was told that --
 - There were no regularly scheduled meetings and a lack of collaboration between the OHR and payroll to resolve issues that affected both functions;
 - Internal “subject matter experts” and stakeholder units were not always at the table or consulted when decisions were made or processes were changed;
 - There was a lack of collaboration between the OHR and IT and a lack of clarity as to who maintained HR technology systems; and

- The lack of regular and relevant office meetings resulted in the creation of silos.
- The team identified or was told of concerns about the recruitment plan for teachers. To illustrate--
 - What may be a first for this HR office, a comprehensive recruitment plan was currently under development;
 - Current collective bargaining agreement language impedes the timely recruiting, selecting, and onboarding of new teachers to the district. As a result, the lack of timeliness in starting the annual internal transfer, recruiting, and hiring processes placed the district at a disadvantage in securing the best candidates;
 - The team heard that teachers providing early notice of anticipated retirement at the end of the school year were disadvantaged in that their health benefits were interrupted the day after separation from CCS employment until their state retirement health benefits became effective. As a result, many teachers waited until July and August to submit retirement paperwork, well-after highly qualified and desired teacher candidates received contract offers from other districts;
 - The OHR is not viewed as an essential partner in solving critical shortages such as with special education teachers;
 - The office provided no evidence of viable partnerships with selected non-local universities in the development of teacher pipelines;
 - Adequate funds were not budgeted for OHR to support even a modest recruitment strategy and marketing effort. The team heard that the current recruitment budget was \$20,000, which was probably insufficient for job fair travel and posting teacher openings on the leading region- and state-wide online teacher posting websites, career sites, and organizations;
 - Principals shared that they were not represented at the planning table to provide input or collaborate in developing recruitment strategies and guidelines, and that they were not invited to participate in job fairs;
 - Office staff were unable to articulate the value proposition of joining the CCS teacher team; and
 - There was no system in place to identify, track, and recruit in a timely fashion full time highly effective student teachers and substitute teachers.
- Recruitment of non-teaching personnel, including principals, central office professional staff, and support staff was hampered by --

- Required dependence on the City of Columbus Civil Service Commission²⁵ for the timely testing of candidates, especially for hard-to-fill positions.
- The lack of a “grow your own pipeline” for principals and skilled trade²⁶ personnel;
- The lack of ability to provide and pay internships to CCS high school students to improve labor pipeline opportunities; and
- No existing partnership with career technical education (CTE) programs and associated industry programs to increase the pipeline for skilled trades candidates;
- Despite the significant turnover of HR staff, especially in leadership positions, the team found very little evidence of proactive succession planning,²⁷ capacity building, or cross-training in critical functions to ensure continuity in the event of absences, leaves, retirements, promotions, or resignations.
- Little evidence of training, supporting, or communicating best practices had taken place in HR. For example --
 - The online employment application process did not communicate the value proposition of working in the district;
 - There appeared to be some confusion between position control and strategic staffing;
 - The time to onboard employees or turnover rates was not formally tracked;
 - There were inconsistent levels of service because there were no service level agreements, written standard operating procedures (SOP), no written processes or reliable flowcharts in place, no definition of what engagement should look like from site to site, and inconsistent hiring processes in place;

²⁵ The Ohio Revised Code (ORC) provides that the Commission oversees various administrative personnel functions for approximately 2,587 employees in the classified service of the Columbus Board of Education (Board). In accordance with the ORC and an agreement executed by both the Commission and the Board, services provided by Commission staff for the various administrative personnel functions are billed to the Board. This agreement covers any and all work associated with class plan maintenance (creation, revision, abolishment of class specifications), test development and/or administration, and trial board administration for the Board. The Commission will make such services available to the Board as long as Board funding is available for reimbursement of Commission costs for the services. As of January 1, 2018, there were 127 classification specifications in the Columbus City Schools’ class plan. The Commissioners have the responsibility to establish the Rules that govern the selection, classification, promotion, and termination of the classified employees of the City of Columbus and the Columbus City Schools. Source: <https://www.columbus.gov/WorkArea/DownloadAsset.aspx?id=2147511047>.

²⁶ Skilled trades include automotive mechanics, carpenters, electricians, HVAC (heating, ventilation, and air conditioning), locksmith, masons, plumbers, roofer, welders, and others with specialized skills.

²⁷ One recent exception may be the September 2019 hiring of an Executive Director, Human Resources Operations.

- Dashboards were not utilized in the office to measure staffing levels, performance, goal tracking, and decision making; and
- Exit interviews were not utilized to track the reasons why employees voluntarily separated from service.
- It was unclear who owned performance management at the enterprise level, and if there was a defined rationale for why and how performance evaluation was used in the district. In addition --
 - Oversight for performance evaluation was divided between academics for certificated staff and the Office of Human Resources for classified staff;
 - There may be unintended consequences by bifurcating these functions in that the district created, with this design, operational silos that minimized collaboration, cooperation, and alignment; and
 - The team was told that classified staff evaluations were generic and not linked to specific job functions, responsibilities, or goals. This practice was not consistent with Board Policy 4120.01, which states, “*Employees will be evaluated, at least in part, against their job descriptions.*”²⁸
- It appeared that the 2017-21 CCS staffing plan was owned by budget, and that the OHR was not actively involved in its development.

Organization

- The current OHR organizational structure, and functionalities within the structure, did not suggest an understanding of strategic alignment and service-delivery throughout the employee life cycle. Specifically, the OHR was not organized around the critical functions of --
 - *Onboarding*, including recruitment, vetting, selection, and placement;
 - *Employee Services*, including performance assessment, employment verification, leaves, benefits, employee retention, position classification, highly competitive compensation, and employee misconduct and discipline; and
 - *Exit Transition*, including retirement, resignation, non-renewal, exit interviews, and trending.

²⁸ Source: <https://go.boarddocs.com/oh/columbus/Board.nsf/Public?open&id=policies#>.

- There was a lack of coordination and alignment between the OHR and Information Technologies (IT) in that IT maintained Human Resources Information System functions, which could be managed in-house by the HR Data and Systems Manager.
- The team heard through interviews that there might be a new Chief HR Officer in place effective July 2020.
- Not all position titles listed on the OHR organizational chart aligned with the position titles on the job descriptions provided to the team.
- An entire family of Safety and Security job descriptions were inexplicably provided to the team by the Safety and Security unit, which was under the purview of the Chief Operating Officer.
- The team found no evidence of an 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 absence of a classification and compensation incumbent in the OHR reflects a lack of strategic resource management.
- The team saw no evidence that the HR organizational structure and workflows were examined, and if staff or positions could be repurposed to achieve greater operational efficiency and effectiveness.

Operations

- The focus group of principals and assistant principals interviewed by the team rated (1-10, with 10 being high) HR’s “overall” level of service an average of 6.0. The focus group indicated that their ratings were based on --
 - Not knowing who to call for specific needs;
 - The lack of effective and timely communication and information;
 - Functional areas within the office worked in silos;

- The system was “broken;”
- Telephone calls and emails were not returned; and
- Site administrators left campuses to drive to the OHR to resolve HR issues.
- The team identified or heard the following concerns about the office’s use or non-use of technology --
 - There was a lack of systems planning and coordination that resulted in an over-reliance on staffing vs. process improvements;
 - There was a lack of focus and consideration of customers’ or end-users’ ease of use;
 - There were few technological opportunities for customers to interface with OHR staff;
 - The team was told that the district’s labor partners were not always receptive to changing or automating current OHR processes;
 - Many HR staff were not technologically savvy, did not possess the vision needed to identify integrated needs assessments, or possess the necessary skillsets to write the requirements or justifications for future OHR technology needs;
 - The team found multiple software systems (at least 11) and repositories of data used by the OHR. These separate systems offered very limited integration where critical data could quickly and efficiently be passed between systems.²⁹ As a result --
 - Procured software systems were not maximized or leveraged to their full capacity;
 - Data were taken out of one software system and hand-entered into another software system;
 - There were dual and sometimes triple data entry, which, had to be reviewed at each stage to ensure accuracy;
 - The OHR staff does not have access to needed data. For example --
 - The OHR was dependent on Information Technologies (IT) to provide necessary data to begin the annual teacher transfer and assignment process.
 - The team heard that the district’s enterprise resource planning (ERP) software was not adequate for online benefits enrollment because the date of birth, gender, or social

²⁹ The team made multiple requests to OHR staff to document the functionality that each system provided, and which systems “talked” to each other. All requests for this information went unanswered.

- security numbers were not required fields. When the employee did not enter the needed information, OHR staff manually entered it; and
- The OHR was overly dependent on the use of outdated and expensive telephone line facsimile (fax) machine technology. As a result --
 - The team was told that when the fax machine in the HR office was “busy,” the sender was often unaware the fax did not go through;
 - Ensuring faxes were correctly and timely received was dependent on adequate machine memory, paper, and toner;
 - Potential savings, using current digital technology, are being usurped by maintaining expensive telephone lines and fax machines; and
 - The extensive use and dependence of the fax machine created unnecessary manual processes and loss of productive time when staff “chased-down” lost paperwork, which exacerbated the perception of poor customer service.
 - The team found the work of the office to be highly transactional, labor-intensive, often redundant, and did not focus on efficiency. For example --
 - Even with considerable technology available, there was an over-reliance on manual and paper processes;
 - One OHR work unit indicated that 75 percent of their workday was spent performing manual processes. To illustrate --
 - Annual employee step increases for eligible employees were calculated manually;
 - Employee leaves were manually produced and updated on spreadsheets; and
 - Individual index cards were used to track employee longevity.
 - Written processes and procedures, documented workflows, standard operating procedures (SOPs), and timely access to data necessary to create “an effective and efficient operation with quality control standards,” were generally missing. As a result --
 - Operating procedures, systems, and processes were unnecessarily complicated, slow, and cumbersome; and
 - There continued to be a substantial reliance on paper forms and manual processes that resulted in a high risk of error.

- Even though KPIs were readily available, HR staff could not answer basic metric questions, e.g., time to fill, attrition rates, number of teacher terminations, etc.
- Vacations were approved for OHR staff during peak onboarding periods, which created critical service voids when an “all hands-on deck” policy was necessary.
- The team found a lack of ownership in the OHR of new employee orientation, as evidenced by the comment, “The acquisition team’s responsibility stops at its presentation to the Board of Education.” As a result --
 - The acquisition team appeared to see its role solely in the acquisition of people, with no responsibility beyond that; and
 - The lack of ownership of new employee orientation and on-boarding in and of itself created increased transactional work for OHR.
- The inability to provide typical HR support resulted in the Department of Transportation’s (DoT) running a “shadow” HR function because HR was not meeting its needs. The DoT conducted fingerprinting of applicants, screening, and performed applicant driving history reviews.
- Multiple interviewees indicated that the very generous district attendance policy allows employees to take a high number of days off with no consequences.
- The district’s low daily teacher substitute placement rate was exacerbated by the strikingly small substitute teacher pool of only 400 teachers.
- Exhibit 7 below compares the district’s self-reported human resources KPI data with other CGCS districts located in Ohio and throughout the nation.³⁰ Scores are presented for comparison purposes and to identify opportunities for improvements.³¹ Noteworthy KPI comparative data indicated that --
 - *CCS Employee Separation Rate - School-Based Non-Exempt Staff* was significantly higher than other CGCS districts in Ohio and the CGCS national medians;
 - *CCS Exit Interview Completion Rate* of zero percent was significantly lower than other CGCS districts in Ohio and the CGCS national medians;
 - *CCS Substitute Placement Rate* was significantly lower than other CGCS districts in Ohio and the CGCS national medians; and

³⁰ CGCS must rely on the accuracy and consistency of the data reported by school districts when making comparisons.

³¹ Source: 2017-2018 CGCS KPI data.

- Critical CCS *Time to Fill Vacancies* data were not submitted.

Exhibit 7. Key Performance Indicator Comparison

2017-2018 Key Performance Indicators Human Resources	Columbus City Schools	CGCS Ohio Districts Median	CGCS National Median	Noteworthy CCS Score	Note II
Employee Relations - Discrimination Complaints Per 1,000 Employees	0.4999	0.7542	0.9854	Best Quartile	Lower is Better
Employee Relations - Misconduct Investigations Per 1,000 Employees	21.7446	4.8842	21.5493		Lower is Better
Employee Separation Rate	9.94%	9.86%	12.62%	Best Quartile	Lower is Better
Employee Separation Rate - Instructional Support Staff	8.12%	14.77%	11.01%		Lower is Better
Employee Separation Rate - Non-School Exempt Staff	12.50%	12.58%	12.60%		Lower is Better
Employee Separation Rate - Non-School Non-Exempt Staff	4.30%	8.82%	11.91%	Best Quartile	Lower is Better
Employee Separation Rate - School-Based Exempt Staff	5.78%	8.90%	7.61%		Lower is Better
Employee Separation Rate - School-Based Non-Exempt Staff	30.90%	17.03%	15.38%	Worst Quartile	Lower is Better
Employee Separation Rate - Teachers	7.93%	7.08%	10.99%		Lower is Better
Exit Interview Completion Rate	0%	33.28%	22.53%	Worst Quartile	Higher is Better
Health Benefits Cost Per Enrolled Employee	\$15,337.30	\$14,596.30	\$8,204.40		
Health Benefits Cost Per Enrolled Employee - Self-Insured Districts	\$15,337.30	\$15,337.30	\$8,248.61		
Health Benefits Enrollment Rate	92.01%	92.63%	89.39%		Higher is Better
HR Cost Per \$100K Revenue	\$481.60	\$579.07	\$481.60		Lower is Better
HR Cost Per District FTE	\$595.00	\$870.88	\$608.44		Lower is Better
Substitute Placement Rate	54.19%	70.89%	80.21%	Worst Quartile	Higher is Better
Substitute Placements With A BA/BS Or Higher	100%	100%	66.27%	Best Quartile	Higher is Better
Teacher Absences Per Teacher	17.7694	22.0845	14.2265		
Teacher Retention - Average For 1-5 Years	73.76%	71.05%	59.78%		
Teacher Retention - Remaining After 1 Year	84.87%	81.34%	74.39%	Best Quartile	Higher is Better
Teacher Retention - Remaining After 2 Years	75.00%	75.33%	66.83%	Best Quartile	Higher is Better
Teacher Retention - Remaining After 3 Years	72.81%	72.01%	57.47%	Best Quartile	Higher is Better
Teacher Retention - Remaining After 4 Years	69.93%	60.42%	50.80%	Best Quartile	Higher is Better
Teacher Retention - Remaining After 5 Years	65.20%	55.10%	43.13%	Best Quartile	Higher is Better
Teachers Highly Qualified In All Assignments	80.24%	74.59%	88.53%		
Teacher Vacancies on the First Day of School	11	31	71		
Teachers With National Board Certificate	2.45%	0.98%	1.70%		
Time To Fill Vacancies - Instructional Support (Days) NDS=No Data Submitted	NDS	NDS	24.12		
Time To Fill Vacancies - Non-School Exempt (Days)	NDS	NDS	43.5		
Time To Fill Vacancies - Non-School Non-Exempt (Days)	NDS	NDS	34.5		
Time To Fill Vacancies - School-Based Exempt (Days)	NDS	NDS	20.18		
Time To Fill Vacancies - School-Based Non-Exempt (Days)	NDS	NDS	33		
Time To Fill Vacancies - Teachers (Days)	NDS	100	23.07		

Source: CGCS KPI Project.

Recommendations

The CGCS Strategic Support Team developed the following recommendations³² to improve the Columbus City Schools Office of Human Resources’ strategic value to the district:

1. Obligate the Office of Human Resources leadership to setting a compelling focus on *customer service* and accepting responsibility for identifying, developing, owning, and articulating priorities that support the district’s Mission, Core Values, and Strategic Plan. These priorities should include --

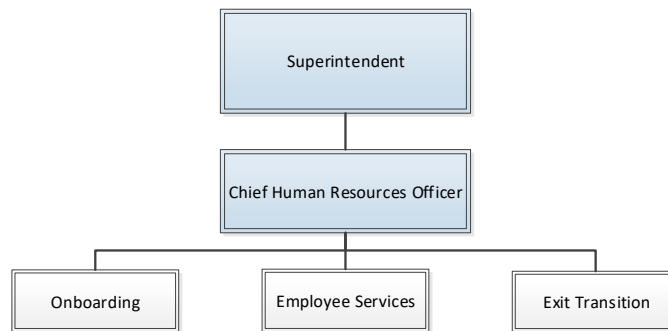
³² Recommendations are not listed in any specific order or priority.

- a. Shifting emphasis away from transactional activities to a vision of proactivity and becoming a strategic organizational resource;
- b. Convening--with a sense of urgency--ongoing meetings to analyze the findings and recommendations identified in the 2001 review and this management letter. Incorporate and merge relevant recommendations from the 2001 report and all recommendations from the 2020 report into one document. Use the “combined” recommendations as a “road map” to develop, prioritize, and assign “project owners” to move all recommendations forward;
- c. Developing and setting appropriate benchmarks, goals, service level plans and standards, employee productivity expectations and measures, and ensuring empowerment and accountability across the office;
- d. Developing a realistic five-year OHR strategic plan that is laser-focused on *customer needs*. The plan, to be developed with the participation of OHR staff and other stakeholders, should include short, intermediate, and long-term process improvement opportunities, quantifiable goals, performance measures, accountabilities, targets, metrics, timelines, and a strategically communicated rollout plan. The plan shall be consistent with the strategic plan of the district and refreshed annually;
- e. Developing comprehensive OHR-wide policies and procedural guides (SOPs) and flowcharts to ensure that OHR employees know what to do and how to do it;
- f. Transitioning to a data-driven organization that relies upon fact-based and analysis-centric justifications for decisions, including the use of benchmarks and techniques such as --
 - i. Basic HR metrics and dashboard management information (e.g., turnover rates, absentee rates, substitute fill rates, vacancy rates, time to fill vacancy rates, recruitment rates, and retention rates);
 - ii. Cost-benefit analysis, risk assessment, and business case justifications to continually move the office forward, including the consideration of --
 - Alternatives to current delivery methods, such as outsourcing worker compensation administration, leave of absence administration, and substitute placement administration;
 - Providing and funding paid internships to district high school students to improve labor pipeline opportunities;
 - iii. Root-cause analysis to address operational challenges;
 - iv. Ongoing, salary and benefit surveys to measure competitiveness; and
 - v. Defined performance measures, including KPIs, industry best practices, standards for all

primary functions of the office, and holding all OHR staff accountable for making progress on these measures.

2. Research and evaluate the opportunity to fill positions with high-quality candidates as expeditiously as possible by the Board “delegating authority” to the superintendent. This authority would allow the superintendent to approve the onboarding or backfilling of selected new hires or promotional candidates prior to “formal” Board approval. Board approval, if still necessary, can occur at the next Board meeting.
3. Reorganize the Office of Human Resources to optimize efficiency and effectiveness, sharpen its focus, improve internal communication, eliminate silos, and promote clear lines of responsibility, authority, and accountability. Exhibit 8 below illustrates a potential high-level functional reorganization for the office. Under this organization --

Exhibit 8. Proposed Human Resources Functional Reorganization



Source: CGCS Review Team

- a. The Executive Director – Human Resources Operations position, with one-to-one reporting relationship, would be eliminated. Funding for this closed position should be reallocated to strengthen OHR operational units consistent with recommendations contained within this report;
- b. The Chief Human Resources Officer’s span of control would be simplified, permitting increased oversight, ensuring principals and department heads are not burdened with performing duties that HR staff should fulfill, and monitoring service metrics and dashboards. The core functions and workflows of the Office of Human Resources would be reorganized, and customer-focused on --
 - i. Onboarding (including marketing, recruiting, selection, applicant tracking, vetting, and the timely placement of new and promoted employees);
 - ii. Employee Services (including performance assessment, organizational development, employee retention, position classification and compensation, leave, benefits, labor management and employee relations, OHR technology, and employment verification);

- iii. Exit Transition (including retirement, resignation, and other separation processing including terminations and exit interviews);
 - c. Ensure that individuals placed in leadership positions in the new functional organization have the appropriate skills, expertise, experience, and ongoing training to be successful;
 - d. Fill positions, as necessary, in the new organization with individuals who are able and willing to perform duties that are required; and provide staff the autonomy and opportunity to perform their work. Recognize staff members when they display quality work, and hold all staff accountable for results;
 - e. Conduct a comprehensive study to determine appropriate staffing levels for all functions within every section in the new HR organization; and
 - f. Develop concise reporting relationships with clearly defined job titles, roles, and job descriptions to provide a more realistic portrayal of duties, responsibilities, expectations, accountabilities, and reporting lines that represent the core functions of the new organization and its focus on customer service.
4. Implement a systematic review, evaluation, and reconstruction of the office's teacher recruitment program. Ensure that a representative group of school site administrators and labor partners are at the table, and that the following activities are incorporated into the reconstructed program--
- a. An annual marketing and recruiting master plan designed to meet the needs of the district and aligned with changing market demands;
 - b. An annual recruiting calendar that is coordinated with, but not in conflict with, the district's master calendar that provides for recruiting to begin earlier than other districts that are competing for the same candidates. Vacation scheduling for staff needs to be factored into the calendar to ensure appropriate OHR staffing levels are in place during peak recruiting and onboarding periods;
 - c. Annual goals and utilization of previous results to guide recruitment activities;
 - d. Recruiting staff who are appropriately trained and held accountable for results;
 - e. Clearly defined and updated procedures and processes are in place for the timely recruitment, selection, fast-track placement of candidates, and the expedited (early) offering of contracts;
 - f. Identifying previous, or anticipating potential, "bottlenecks" or "chokepoints" in the recruitment and onboarding process, and proactively taking corrective action well in advance of annual recruitment efforts;

- g. Identifying and tracking highly effective substitutes, student teachers, and paraprofessionals throughout the year as part of the recruitment process;
 - h. Ensuring that specific strategies and funding are in place to address hard-to-staff and critical personnel areas;
 - i. Establishing substitute placement rate goals that exceed the CGCS national median;
 - j. Ongoing relationship building and communication with local university and non-local university partners to build personnel pipeline;
 - k. Ensuring that communication between applicants, principals, and HR staff is timely, accurate, and meaningful to preclude teacher candidates from seeking employment elsewhere;
 - l. Processes are in place for the ongoing reporting of staffing and vacancy levels to leadership and stakeholder groups;
 - m. Continuing efforts are in place to ensure the retention of new teachers, including safety-net programs such as, but not limited to, Peer Assistance and Review (PAR), mentoring, and staff development. Track and fully leverage the programs; and
 - n. Track all costs associated with recruiting and onboarding. Leveraging these data are important for future budget justifications that would demonstrate that financial and human resources were efficiently utilized with maximum return on investment.
5. Build a strategic partnership with the Office of Professional Learning and Licensure to recognize Human Resources' broader role in professional development and organizational coherence. Together, the offices should --
- a. Design and implement district-wide professional development plans that engage new and continuing employees, including --
 - i. A well-planned and documented orientation and onboarding process, incorporating --
 - A welcoming environment for new employees;
 - A well-defined and structured orientation to the district and its culture;
 - Clear communication of the onboarding process so that potential employees are not lost in the complexities of recruitment, selection, job offers, vetting, background, drug test clearance, and orientation into the CCS family;
 - ii. Job-specific onboarding and training for new hires;

- iii. Ongoing professional development to enhance job skills and promotional opportunities for current employees;
 - b. Developing strategies to “grow your own pipeline” for principals; and
 - c. Creating an *organizational change management* capacity to address and manage adverse impacts on employees due to altering organizational structures (reorganization) and changing processes.
6. Strengthen external stakeholder communication activities to modernize and enhance HR services and support by implementing meaningful outreach plans; and employing regular meetings with school principals (or a representative group), budget and payroll staff, regional staff, IT staff, and operations leadership to address concerns and identify opportunities for improved service.
7. Develop or hire leaders who will lead by example to champion knowledge sharing, collaboration, and inclusion. Ensure regular staff meetings take place throughout the OHR with specific agendas, documented minutes of discussions, decisions, and follow-up activities, so employees know --
 - a. The district’s and OHR’s goals and objectives and how they will be achieved;
 - b. That intraoffice and interdepartmental collaboration is taking place with all appropriate departments, offices, stakeholders, and subject matter experts 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 OHR leadership is held responsible for ensuring that information and feedback is disseminated up-and-down and side-to-side within and between offices and departments and offices; and
 - f. That employee feedback and suggestions are welcomed and considered, so team members know there is an ongoing process improvement program in place to encourage innovation.
8. Develop succession planning and cross-training within the office to ensure knowledge transfer and the orderly transition of responsibilities.
9. Create an alliance between CHRO and the Chief Information Officer to resolve interdepartmental and multidimensional operational, technical, and training issues that marginalize HR’s ability to leverage the district’s existing Enterprise Resource Planning (ERP) software and associated technology systems. Together, this team should address, design, and

create timelines, assign project owners, develop accountabilities, and cost-out possible solutions for the following --

- a. Using Six Sigma-like methodology³³ to map relevant workflow processes, identify critical touchpoints, and perform a gap analysis that would align processes that are efficient, effective, and outcome-driven, with the goal of --
 - i. Maximizing available modules in current systems to increase efficiency to (significantly) reduce existing manually intensive processes;
 - ii. Integrating and significantly reducing the current number of software systems currently utilized by OHR; and
 - iii. Introducing dashboards to monitor and manage core OHR functions and metrics.
 - b. Developing an in-depth OHR employee training program that promotes an understanding of how existing or new modules in CCS and OHR systems can streamline functions to gain efficiencies;
 - c. Creating OHR user-driven report generation utilities for development of needed management information and data;
 - d. Evaluating the cost-benefit of converting existing fax machine and telephone line costs to modern online digital technology; and
 - e. Determining what data will be “owned” by OHR, and what data will be “owned” by others (budget, information technologies, etc.).
10. Establish, for all classified employees, evaluation and performance assessment instruments and processes that incorporate expectations, performance measures, and professional growth strategies that are consistent with School Board policies. Educate administrators, managers, and supervisors on the effective use of classified employee evaluations and conducting evaluation conferences. Create systems to track and ensure *all* classified employees are assessed annually.
11. Create opportunities to invite and confer with internal and external stakeholders to provide input and analyze potential outcomes for the following activities at least --
- a. Brainstorming with the Columbus Education Association (CEA) to identify CEA agreement language that could be modified to --

³³ Six Sigma methodology is a structured approach to business problem solving by applying specialized techniques and tools to achieve quality and process improvements for heightened decision making. The district may need to contract with a consulting firm that specializes in this process.

- i. Encourage teachers planning to retire at the end of the school year to notify the OHR by January 15th of that school year, thus allowing the teacher transfer process to begin earlier;
 - ii. Ensure that teachers providing the January 15th notification to OHR as described above (11.a.i.) are not disadvantaged by an interruption of their health or any other benefits, thus reducing the number of very late retirement notifications to OHR to more accurately reflect teacher transfer opportunities based on anticipated needs for the following school year;
 - iii. Complete the teacher transfer process earlier to significantly improve the district's ability to offer early contracts to high-quality teacher candidates needed to backfill vacated teaching positions, especially hard to fill positions; thus increasing the number of *regularly assigned* teachers in classrooms the first day of school and reducing the number of day-to-day substitutes;
- b. Collaborating with the City of Columbus Civil Service Commission to identify and implement strategies to fast-track the testing of candidates and development or update job descriptions;
 - c. Establishing and staffing with cross-functionally trained personnel a “one-stop” OHR customer information walk-in and telephone service center to provide same-day responses to all requests from both internal (district employees) and external customers;
 - d. Partnering with career technical education and industry programs to increase the pipeline of skilled trades candidates;
 - e. Streamlining the online application procedure by making it more user-friendly, especially for entry-level positions. Design strategies to assist applicants who are not computer savvy to navigate the required online application process, and to assist applicants who may not be English proficient; and
 - f. Reviewing and updating the *Frequently Asked Questions Related to Retirement*³⁴ (FAQ) document to correct inconsistent and grammatically incorrect language currently contained within the FAQ document.
12. Implement programs to measure the degree to which OHR provides services that are responsive, results-oriented, and meet the needs of its customers. Use customer satisfaction surveys³⁵ and focus groups to identify areas of concern. At a minimum, solicit input from applicants, school site administrative staff, teaching staff, support staff, and all applicants.

³⁴ Source:

<https://www.ccssoh.us/cms/lib/OH01913306/Centricity/Domain/223/Retirement%20FAQs%20edited%2051418.pdf>.

³⁵Customers include all current and future district staff.

Use this input to establish future priorities, training opportunities, and process improvements.

13. Reduce district exposure to unnecessary risk and liability by conducting a comprehensive review of current district worker compensation mitigation and training practices to ensure that-
 - a. Employees are taught, and can demonstrate before implementation, proper and safe usage of all equipment that employees may be asked to operate at district work locations;
 - b. A clear process is in place to mitigate hazards (such as potholes) that result in worker compensation claims. Immediately repair such hazards to prevent others from being injured;
 - c. Before returning to work from a worker compensation leave, the employee receives remedial training on how, if possible, the injury could have been avoided; and
 - d. Annual awareness training for all employees (school sites and non-school site locations) on identifying and reporting potentially unsafe conditions that could place students, staff, parents, visitors, and the district at risk.
14. Monitor turnover rates, establish exit interview protocols for *all* employees who voluntarily separate from CCS, and identify and track the causes of leaving for opportunities to make policy changes.
15. Develop a comprehensive plan to boost employee retention and provide opportunities for employees at all levels to enhance their skills and learn industry best practices through --
 - a. Participation in professional organizations,
 - b. In-depth new employee orientations,
 - c. Cross-functional teaming and training, and
 - d. Visiting peer districts to gather performance, best practices, recruitment, customer service, and technology strategies.

ATTACHMENT A. STRATEGIC SUPPORT TEAM

Robert Carlson

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 master degrees 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 with the HR Division 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 for school districts and other governmental agencies and is a very active member of the Council's Strategic Support Teams.

Paul Idsvoog

Paul Idsvoog is the Chief of Human Resources and Labor Relations for Fresno Unified School District. Mr. Idsvoog has extensive experience in both private business and public education as prior to returning to Fresno as the Chief Executive of Labor Relations for Fresno Unified where he served as the chief negotiator for the District's seven bargaining units, he was the Vice President and owner of a food service contract company headquartered in Milwaukee, WI. His duties as Vice President required him to serve on all bargaining teams as the chief negotiator as well as responsible for all departments within the organization including Human Resources, Operations, Finance, Sales and Marketing. Mr. Idsvoog has a master's degree in Business Administration (MBA) from Colorado State University and was selected as the 2017 Administrator of the Year in

the Personnel and Human Resources Division by the Association of California School Administrators Region IX Chapter.

Shannon S. Krysl

Shannon S. Krysl has been Chief Human Resources Officer for the Wichita Public Schools for the last eight years. Prior to becoming CHRO, she was Executive Director of Employee Benefits and Risk Management for the school district. Shannon has an education degree and a law degree from Washburn University. She has worked in both the public and private sectors in the fields of employment law, labor law and Human Resources for over 30 years. Shannon has served as an employment law litigator, administrative law judge and as chief labor negotiator. She was recently inducted into the Wichita Business Journal's Human Resources Hall of Fame.

June Taylor

June Taylor has built a career dedicated to the operational excellence of mission-driven organizations. She is the Chief Human Resources Officer for the 15,000-employees and 90,000-students of the Denver Public Schools. After clerking for the 2nd Judicial District in Colorado, June spent a decade as a federal attorney with Western Area Power Administration and the Federal Communications Commission. In 2015, Taylor joined Governor Hickenlooper's cabinet as the Executive Director of the Colorado Department of Personnel & Administration and State Personnel Director. In this dual role, she served as the state's chief administrator and oversaw all human resources functions for the state's more than 33,000 classified employees. Taylor has been in senior leadership for 18 years in three distinct industries including serving as the Attorney General's Chief Operating Officer and head of Lockheed Martin Space's Culture, Diversity, and Equal Opportunity Programs. She is a member of the Colorado Asian Pacific American Bar and received the Lockheed Full Spectrum Leadership Award. She graduated *cum laude* and Phi Beta Kappa from the University of New Mexico, and earned her JD from the University of Denver College of Law.

Lori L. Ward

In August 2016, Lori L. Ward became the Chief Talent Officer for the Cleveland Metropolitan School District. In her role, she leads a team of 40 Human Resources staff members focused on the complete life-cycle of an employee, from recruitment/sourcing to off boarding. Mrs. Ward is accountable to execute the District's Talent-Seeking Strategy, the recruitment and retention of high-quality teachers and Principals, which is a component of the District's Portfolio Strategy. Under Mrs. Ward's leadership, the District has created a Non-Bargaining Compensation Manual, an Employee Policies and Procedures Manual, received a 5-year \$5MM grant targeted for teacher retention programming, and created a Leadership Development program for aspiring instructional and non-instructional leaders. Mrs. Ward began her public education career in Dayton Public Schools in 1995 as a teacher. From 1999 to 2010, Mrs. Ward served in several Central Office positions from CIO, COO, to Deputy Superintendent. In July 2010, Mrs. Ward was named as

Superintendent and served until June 2016. Having worked for IBM Corporation for 13+ years, Mrs. Ward brings her leadership experience, as well as, human resources knowledge, technology and various management strategies to the position. Mrs. Ward holds a B.S. from Central State University, a M.Ed. from the University of Dayton and is SHRM-CP and pHCLE certified.

ATTACHMENT B. WORKING AGENDA

**CGCS Strategic Support/Technical Assistance Team
Human Columbus City Schools
Human Resources Review
March 1-4, 2020
Contact: Mira R. Wright
Chief Human Resources Officer**

Subject to Change as Required

Sunday, March 1

**Group Team Arrival
Sheraton Capitol Square
75 East State Street
614-365-4500**

6:15 **Team to Meet in Hotel Lobby**

6:30 **Dinner Meeting** **Dr. Talisa Dixon (TBD)**
Sheraton Plaza Restaurant Superintendent
Ms. Mira Wright
Chief Human Resources Officer

Monday, March 2

7:00 - 7:45 Team Continental Breakfast
Conference Room TBD

8:00 - 8:45 Team Interview **Ms. Mira Wright**
Chief Human Resources Officer

9:00 - 9:45 Team Interview **Terri Trigg**
Director, Talent Acquisition
Alicia Reynolds
HR Generalist

10:00 - 10:45 Team Interview **Courtney Hale**
Director, HR Administration

11:00 - 11:45 Team Interview **John Dean**
Director, Labor Management &
Employee Relations
Mary Anne Baum
Manager, Labor Management &
Employee Relations

12:00 - 1:00	Working Luncheon
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1:00 - 1:45	Team Interview	<p><u>Mike DeFabbo</u> Executive Director, HR Operations</p>
2:00 - 2:45	Team Interviews	<p><u>Ebony McShan</u> Manager, Talent Acquisition Classified</p> <p><u>Amanda Hill</u> HR Rep</p>
3:00 - 3:45	Team Interview	<p><u>Ashley Lynch</u> HR. Asst. II</p> <p><u>Alexandre Meldaus-Crockett</u> HR Asst. I</p>
4:00 - 4:45	Team Interviews	<p><u>Hollie Aselage</u> Manager, Employee Benefits Administration</p> <p><u>Mesha Bostic</u> <u>Jovanni Jeter</u> Employee Benefits Analysts</p>

Strategic Support Team Discussion of Work Plan

Tuesday, March 3

7:00 - 7:45	Team Continental Breakfast	
8:00 - 8:45	Team Interviews	<p><u>Sandee Donald</u> Executive Director, Teaching & Learning</p> <p><u>Anette Morud</u> Senior Executive Director, Business & Operations</p> <p><u>Steve McElroy</u> Executive Director, Business & Operations</p>
9:00 - 9:45	Team Interviews	<p><u>Eric Ulas</u> HRA Manager</p> <p><u>Penny Roth</u> Workers Comp Coordinator</p> <p><u>Rose Cornelius</u> HR Asst. I SEMS</p>
10:00 - 10:45	Team Interview	<p><u>Ryan Shor</u></p>

Sheila Smith

Dario Pardo

IT Programmers

11:00 - 11:45 Team Interview

LaMeika Robinson

Manager, Talent Acquisition Certificated

Leslie Butler

HR Rep

Anita Ward

HRIS Coordinator

12:00 - 1:00

Working Luncheon

1:00 - 1:45 Team Interviews

Scott Gooding & Janis Thom

Executive Director of Budget

Mike McCammon

Comptroller

Betty Arey

2:15 - 3:00 Team Interviews

Dianne McLinn

David Taylor

Hearing Officers

Labor Management &

Employee Relations

3:30 - 5:00 Team Interviews

Building Principals

Randomly Selected Across Grade Levels & Regions

Stephanie C Porta <sporta3028@columbus.k12.oh.us>;

Charles Richardson Jr <crichard@columbus.k12.oh.us>;

Stephanie L Patton <spatton@columbus.k12.oh.us>;

Erica D Dodson <edodson@columbus.k12.oh.us>;

Tyree Pollard <tpollard@columbus.k12.oh.us>;

Brandy L Koeth <bkoeth5587@columbus.k12.oh.us>;

Sandra Santos <ssantos@columbus.k12.oh.us>;

Pamela L Smith <pamsmith@columbus.k12.oh.us>;

Andrew Smith III <ansmith@columbus.k12.oh.us>;

Staci Rouse <srouse@columbus.k12.oh.us>;

Patricia Y DuBose <pdubose@columbus.k12.oh.us>

Strategic Support Team Discussion of Work Plan

Wednesday, March 4

7:00 - 7:30 Team Continental Breakfast

7:30 - 12:00 Team Working Session

Synthesis of Findings & Recommendations

12:00 - 1:00

Team Working Luncheon

Dr. Talisa Dixon

Superintendent

Mira Wright

Chief Human Resources Officer

Adjournment & Departures

ATTACHMENT C. DISTRICT PERSONNEL INTERVIEWED

- Mira Wright, Chief Human Resources Officer
- Terri Trigg, Director, Director, Talent Acquisition
- Alicia Reynolds, HR Generalist
- Courtney Hale, Director, HR Administration
- John Dean, Director, Labor Management & Employee Relations
- Mike DeFabbo, Executive Director, HR Operations
- Ebony McShan, Manager, Talent Acquisition Classified
- Amanda Hill, HR Representative
- Ashely Lynch, HR Assistant II
- Alexandre Meldaus-Crockett, HR Assistant I
- Hollie Aselage, Manager, Employee Benefits Administration
- Mesha Bostic, Employee Benefits Analyst
- Jovanni Jeter, Employee Benefits Analyst
- Sandee Donald, Executive Director, Teaching and Learning
- Anette Morud, Senior Executive Director, Business & Operations
- Steve McElroy, Executive Director, Business & Operations
- Eric Ulas, HRA Manager
- Penny Roth, Workers Comp Coordinator
- Rose Cornelius, HR Assistant I SEMS
- Shawntel Lewis, App Development Manager
- Ryan Shor, IT Programmer
- Sheila Smith, IT Programmer
- LaMekia Robinson, Manager, Talent Acquisition Certificated
- Leslie Butler, HR Representative
- Anita Ward, HRIS Coordinator
- Scott Gooding, Executive Director of Budget
- Janis Thom, Budget Analyst
- Mike McCammon, Comptroller
- Betty Arey, Payroll Administrator
- Dianne McLinn, Hearing Officer, Labor Management & Employee Relations
- David Taylor, Hearing Officer, Labor Management & Employee Relations
- Stephanie C Porta, Principal, Centennial High School
- Stephanie L Patton, Principal, Columbus City Prep School For Girls
- Erica D Dodson, Principal, Arts Impact Middle School
- Brandy L Koeth, Principal, Indianola Informal K-8 School
- Sandra Santos, Assistant Principal, Miffin High School
- Pamela L Smith, Administrator, Brigg High School
- Andrew Smith III, Principal, Valley Forge Elementary School

- Staci Rouse, Assistant Principal, Sherwood Middle School

ATTACHMENT D. DOCUMENTS REVIEWED

- Organizational Charts:
 - 2019-2020 Superintendent's Cabinet, dated January 29, 2020
 - Office of Human Resources, dated February 15, 2020
- 2019-2020 HR Strategic Goals and Priorities
- Job Descriptions
 - Chief HR Officer, created May 2019
 - Executive Secretary, revised November 26, 2018
 - Executive Director of HR & Development, revised February 2010
 - Director, Employee Relations, revised May 14, 2019
 - Director, HR (Administration), opening date May 09, 2019
 - Director, HR Talent Acquisition (Formerly Employment and Staffing), opening date May 09, 2019
 - Manager, HR Administration (not dated)
 - Manager, Talent Acquisition (Classified) (Formerly Employment and Staffing), opening date May 14, 2019
 - Manager, HRIS Data and Projects, revised October 25, 2018
 - Manager, Employee Relations (Employee Relation Business Partner)
 - Employee Relations Business Partner (not dated)
 - Safety and Security Specialist, last reviewed August 26, 2019
 - Safety and Security Specialist II, last reviewed August 26, 2019
 - Safety and Security Supervisor, last reviewed August 26, 2019
 - Safety and Security Compliance Investigator, last reviewed August 26, 2019
 - Safety and Security Training Coordinator, last reviewed August 26, 2019
 - HR Information Systems Coordinator, revised June 25, 2018
 - HR Generalist, revised July 29, 2019
 - Employee Resources Representative
 - HR Representative, revised November 15, 2017
 - HR Assistant II, revised July 29, 2019
 - HR Assistant I, revised July 29, 2019
 - Employee Benefits Analyst, revised June 25, 2018
 - Workers' Compensation Coordinator, revised July 31, 2017
 - Investigator (not dated)
 - Hearing Officer, updated February 2011
- HR Department Budgets FY15-FY20
- Office of Internal Audit
 - HR Operational Audit Report, dated August 27, 2014
 - Follow-up Review HR Operational Audit Part I, dated May 28, 2015
 - HR Operational Audit Follow-up Review: Part II Report, dated September 21, 2016
 - Employee Relations Audit Report, dated January 25, 2018
 - Follow-up Review Payroll Audit Report, dated April 26, 2018

- HR Part III Follow-up Status Report, dated September 27, 2018
- Board Policies –
 - Section 4000 - Classified Staff, adopted April 21, 2015
 - Section 3000 - Professional Staff, adopted April 21, 2015
 - Section 8000 - Operations, revised August 20, 2019
 - Section 1000 - Administration, adopted April 21, 2015
- Human Officers Strategic Goals and Priorities 2019-2020
- Hiring Flyers
- “Spirit of Success” Teacher Recruitment Packet
- SY 19-20 Hiring Update, dated February 24, 2020
- 2020 Board Agenda Timeline
- FY17-FY21 General Fund Staffing Plan, updated February 18, 2020
- CAA Compensation Package, effective August 1, 2019
- 2019-2020 CAA Salary Schedule
- 2019-2020 CEA Salary Schedule
- 2017-2019 CEA Master Agreement
- CSCSA Compensation Package, effective July 1, 2019
- 2019-2020 CSCSA Salary Schedule
- OAPSE Agreement, effective September 1, 2017 through August 31, 2020
- 2019-2020 OAPSE Salary Schedule
- Big 8 Positions by District, dated March 25, 2020
- Frequently Asked Questions Related to Retirement, edited May 14, 2018
- FY 2019 District Profile Report
- 2020 Recruitment Activity Log
- On-Site Job Fair Event, Wednesday, February 26, 2020
- ActPoint KPI, 2017-2018 Human Resources Survey
- Presentation to Columbus City Schools Cabinet: Leave of Absence Administration Improvements, dated January 2020
- Absence Data, January to February 2020

ATTACHMENT E. FINDINGS AND RECOMMENDATIONS FROM THE 2001 COLUMBUS CITY SCHOOLS HR REVIEW



2001 CGCS/Broad Foundation HR Peer Review Findings and Recommendations

(Findings and recommendations highlighted in yellow indicate that the finding or recommendation was still relevant at the time of the 2020 review.)

(Findings, Strategies, and Recommendations)

The Strategic Role of Human Resources

1. Superintendent's Vision for Human Resources

The Superintendent wants a personnel system that hires the best people, develops their talents, ensures their ability to improve student academic performance, and holds them accountable for doing so. The vision articulated by the Superintendent, therefore, involves transforming the department into a unit that does more than hire quality staff efficiently. The Superintendent envisions an operation that manages and nurtures the organization's human resources.

This depiction by the superintendent of an ideal human resources unit pictures the department as being more than a record keeping operation that keeps track of paper and credentials. Instead, the Superintendent expects a department that provides a broader quality of service to the district; acts as a service center for employees; and serves as a catalyst for recruiting high quality personnel to the school district.

2. Attaining the Superintendent's Vision

The Strategic Support Team believes that the Superintendent and top staff need to do several things to accomplish this objective:

- Elevate the placement of the human resources department in the district's organizational chart;

- Rewrite the department’s mission statement to more closely align its work to the larger vision of the district;
- Hire an individual with the necessary leadership skills to operationalize this vision and lead the department with greater vigor;
- Set department goals and objectives that are specific, measurable, and are integrated into job responsibilities and workflow;
- Hold upper- and mid-level managers accountable for achieving the goals set for the department;
- Establish a process for department improvement that focuses both on the initial stabilization of functions and on a longer-term plan for excellence;
- Encourage the department to embrace change by providing overt support and resources for—
 - > planning and implementing a complete reorganization that addresses the HR vision and goals, increases efficiency and necessitates functional and cross functional communication;
 - > optimizing the application of technology to the personnel processes; and
 - > market a new “HR on the Move” with publication of the unit’s vision, goals, objectives, and plans for improvement.

The SST recommends the following strategies to assist with the re-invention of the Human Resources operations of the Columbus Public Schools.

Strategies for Improvement

1. Organization and Staffing

Findings

In general, the department lacks the leadership necessary to transform itself into a more efficient and effective unit that matches the Superintendent’s vision for human resources.

Moreover, the department’s current structure contributes to a “silo mentality” that often diminishes efficiency and slows operations. The SST cite two concrete examples of operations that were duplicative, overlapping, and organizationally unconnected:

- Classified personnel have “read” access to the personnel records system and must send paper copies of personnel actions to certificated personnel staff for input into the system; and
- Data are manually input in three separate systems—personnel, payroll and SEMS (Substitute Employee Management System)

Recommendations

- Recruit a department head that can bring new energy to the department.

- Encourage staff to assume leadership roles and ensure that they have the skills and talent necessary to assume those roles.
- Conduct a functional analysis of the work of each person in the department. Place the work matrix alongside the newly established vision, goals, and objectives of the department to determine whether current functions are adequate to meet new expectations. (Add new functions to work list if necessary.)
- Write new comprehensive job descriptions for all H.R. personnel that match the functional analysis described above and that are ADA compliant and appropriately classed.
- Reconstitute the department but allow current employees to apply for positions under the new structure.
- Reorganize the department along the lines presented on page 14 of this report.
- Hire or retain staff based on needed skills and functions.

2. Workflow

Findings

- The department lacks adequate documentation on how its work is accomplished. The absence of clear procedures, policies, and processes causes confusion among H.R. customers and puts the district at risk. The department, as currently constituted, is also overly dependent on the work of specific individuals performing critical tasks. Work stops when these individuals are absent because their responsibilities are not well enough documented to assign them even temporarily to other staff. Any prolonged absences due to emergencies would have a serious impact on the district.
- The department does not appear to have conducted any “process audits” to ensure that staff time is being used effectively or that desired outcomes are attained in the most efficient manner. Quality control points and processes appear to be lacking.
- Diagrams of “workflows and processes” presented to the SST were little more than job descriptions in graph form. There does not appear to be an adequate understanding of processes and workflow among department staff. This skill is critical in effective human resource operations and is necessary in any new hires.

Recommendations

- Hire a process consultant to review all personnel functions and re-design workflows and processes to ensure effective and efficient work.
- Cross train staff to handle work when someone is absent.
- Train selected staff in process review and workflow management.

3. Hiring Processes

Findings

- The department appears to lack adequate position controls necessary for the district to account for all personnel in each school.
- Principals appear to lack the necessary training in H.R. policies and procedures to fully implement their new responsibilities for personnel hiring. Likewise, better personnel checks need to be instituted before hiring. The district is at some risk with its current lack of training and personnel checks for principals.
- The district's practice of hiring extra teachers at the beginning of the year to cover those who leave results in additional, unnecessary expense for the district. By early December, the district had an excess of 70 certified teachers serving as substitute teachers. Implementing a better position control process, coupled with tighter hiring practices could alleviate this problem.

Recommendations

- Provide training to principals and assistant principals in hiring practices and procedures. (Several available training packages could be tailored to district policies.) Training should delineate what principals can and cannot tell applicants. (Principals, for example, should not be quoting salaries.)
- Collect and track applicant credentials earlier in the hiring process. (Personnel staff currently verifies applicant work experience after hiring rather than having applicants provide the information before hiring. This process puts the onus for documenting previous work experience on department staff rather than on the applicants. The delay in assembling documentation by the first day of school often results in salary errors that have to be corrected later rather than getting all documents before the first day and avoiding problems. Changing this process would help eliminate the "catch up" mentality that plagues the department when it is trying to verify previous employment.)
- Establish a position control process that is better coordinated with the budget office. (It is not clear that the budget office has adequate sign-off on positions before they are filled. For instance, the PAF—Personnel Action Form—does not have a clear place for budget personnel to endorse that funding is available for the position.)
- Design a smoother process for the effective opening of school, beginning with the February/March teacher recruiting period. (Include new hires and 211s. Standardize and communicate process to principals.)
- Establish firmer staffing formulas and exceptions to the formulas and apply them in an equitable manner. (The district may want to look at the weighted student formula developed by the Seattle schools and used in Washington, D.C., San Francisco, and other cities.) A regular staffing formula and tighter position controls could reduce the number of extra teachers hired at the beginning of each academic year.

4. Technology

Findings

- The way that the district chooses and uses technology appears to be a major source of inefficiency. The district maintains three incompatible databases that contain overlapping fields. These include the financial system, the personnel system, and the substitute teacher system. The problem is compounded by the fact that the same data are entered manually into each system. Even when the data are on disk, as the substitute system presents to payroll, the file is printed out and hand

entered. This results in extraordinary inefficiencies and multiplies the mistakes of both the personnel and payroll offices. Differences in the identical data entered into the payroll and personnel systems were easily demonstrated. Data integrity is a serious issue undermining the ability of management to make good decisions and the district to operate efficiently.

- Poor staff communications, silo-like behavior, and distrust hamper solving the human resource department's technology problems. (Programmers indicate that have offered to write bridge software to connect the units but been told no. Senior managers believe that uploading information is impossible while lower level personnel are doing it.)
- The efficiency and effectiveness of department work is also being affected by the availability of data. Who gets what reports and how regularly they get them seems to be an issue. One employee indicated that she could be much more effective if she could get regular reports being generated by people in the same office. This kind of breakdown in communications signals a problem with department leadership.

Recommendations

- Conduct a thorough review of the district's software systems to determine redundancies and gaps.
- Establish a cross-functional task force or working group to begin defining the requirements for the new integrated technology system for the district. (The Council of the Great City Schools has an initiative in place that could help the Columbus Public Schools in this process.)
- Establish a project steering committee composed of senior department heads and assign or hire a project manager to guide the definition of an integrated technology system. Set accountability for performance with time lines for completion of project.
- Convene meetings between the Personnel IS programmer and the Payroll IS programmer to begin developing bridge systems to integrate payroll and personnel until an integrated system can be implemented.
- Develop/acquire desktop software for applicant tracking until Enterprise Resource Process (ERP) is ready
- Review reports needed for all functions of personnel office and ensure the routing of reports to appropriate offices and staff.
- Download Ohio Department of Education certification data and upload to system rather than duplicating the effort.
- Give "change access" to classified staff to allow them to do their own data entry and prevent duplication of efforts.

5. Management and Communication

Findings

- There is little sharing of information among department staff. People working side by side appear not to know what each other are doing. There appears to be no regular meetings, performance objectives, or cross-functional training.

- The vision of the district has not been adequately infused into the personnel department nor is there a common understanding of what the department's goals are.
- Classified staffing has undergone some improvements with the appointment of new leadership in that area. These attempts to develop staff and improve services should be applied throughout personnel.

Recommendations

- Enhance communication within the personnel department by having regular meetings with input into decision making.
- Prepare a work function matrix and share with staff.
- Move toward a staffing pattern that consists of a number of HR generalists who can respond to a variety of customer needs.
- Develop a department mission statement, goals, and performance expectations consistent with the district's and ensure that all staff are trained on them.

6. Operations

Findings

- Department staff should be recognized for getting the work done with so little technology.
- The department's compensation, records, and leave administration need considerable work. Records are not organized in a useful manner and are not stored electronically. Salary adjustments are out of control. The current process involves an incredible amount of re-work to ensure that employees are in the right step and lane. Leaves are processed differently for classified and certified personnel, causing confusion for supervisors who have both classified and certified people on their staffs.

Recommendations

- Require candidates to provide their own experience verification. (If verification is provided by x date, then salary begins on xx date.) Department staff should take steps to verify but not gather.
- Review process of hiring people on step 2 and then losing seniority later. It was not clear to the SST that this incentive to work for the district really worked given the amount of oversight and manual intervention it takes to administer.
- Standardize procedures for employee leaves by group. Train principals and supervisors on the processes.
- Physically reorganize records for ease of use. Consider electronic storage for quicker retrieval and reduction in number of lost records.

7. Labor Relations

Findings

- The Labor Relations division of the human resources department has done well in building relationships with the district's various unions and "getting the work done."
- The division's succession planning is commendable.
- It is not clear, however, where Labor Relations fits into the overall CPS structure. The lack of communication within Personnel Department creates inefficiencies and affects the workflow between Labor Relations and Personnel.

Recommendations

- Define Labor Relations' place on the organizational chart and better integrate the organization and its functions with the human resources department.
- Move disciplinary procedures and hearings into Labor Relations to free up the director to lead the department.

Conclusions

The human resources department of the Columbus Public Schools has many good people working in it, but the unit is marked by weak leadership, disconnected functions, narrow and inefficient services, redundant operations, and poor communications and coordination. The department is not making the best use of its personnel or the district's resources. There is little cross training within the department or professional development for school principals on their hiring responsibilities. These gaps leave the district vulnerable to mistakes, errors, and legal challenge. They also impair quality decision making by management.

The unit's fractured technology and information systems is a particular concern. The lack of integrated software and the reliance on manual processing of records contributes to inefficiencies, errors, and poor communications. In its present form, the department is simply not able to perform the way that the superintendent envisions.

The department needs substantial restructuring. In addition, the human resources unit needs to be better connected with other district operations, particularly budget and payroll, and needs better internal communications and cross-training to ensure smoother functioning. These steps need to include team-building around a clear set of department goals and responsibilities. Reforming the unit will also require re-doing the district's hiring process, mapping its workflow, and re-organizing its personnel.

The success of any major urban school system depends, in part, on the effectiveness of its human resource and personnel departments. The Columbus Public Schools and the children it serves deserve to have a good and effective unit.

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 & 2018
	Legal Services	2005
	Safety and Security	2007
	Research	2013
	Human Resources	2016
	Special Education	2018
	Anchorage	Finance
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
	Classified Staffing	2019
	Information Technology	2019
Austin	Special Education	2010
	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
	Facilities Operations	2019
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
	Facilities Operations	2019
Caddo Parish (LA)		
	Facilities	2004
Charleston		
	Special Education	2005
	Transportation	2014
	Finance	2019
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
Clark County		
	Operations	2019
	Special Education	2019
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
	Human Resources	2020
	Transportation	2020
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
El Paso		
	Information Technology	2019
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
Hawaii		
	Financial Operations	2019
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
	Curriculum and Instruction	2020
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
	Bilingual Education	2019
Puerto Rico		
	Hurricane Damage Assessment	2017
	Bilingual Education	2019
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
	Financial 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
	Transportation	2019
Stockton		
	Special Education	2019
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

TASK FORCE AGENDA

Council of the Great City Schools

Task Force on Leadership, Governance, Management, and Finance

Co-Chair: Barbara Jenkins, Superintendent, Orange County (FL) Public Schools

Co-Chair: Ashley Paz, School Board member, Fort Worth Unified School District

Agenda

October 13, 2020

2:00 pm (eastern)—Meeting Convenes

- Introductions by Co-Chairs
- Update on School Board Governance Support and Technical Assistance (AJ)
- Update on Harvard—Great City Schools ABC Institute for 2021 (Mike)
- COVID Operational Reports (Bob)

Returning to Schools Series

- [Guidelines for Supporting Technology-based Learning Environments](#), July 2020
- [Financial Issues in the Reopening of Schools During the COVID-19 Crisis](#), June 2020
- [Operational Issues in the Reopening of Schools during the COVID-19 Crisis](#)- Facilities, Transportation, and Security, June 2020

Spotlight Series

- [Increasing Ventilation and Improving Air Quality in Schools](#), September 2020
- Water Safety in Reopened School Buildings, October 2020
- Safeguarding the Right to Vote in the Great City Schools, October 2020
- Managing for Results (Bob)
- Deferred Initiatives (Mike)
 - Vaping Survey
 - Bonding Initiative
- Strategic Support Teams (Bob)

3:00 pm—Meeting Adjourns