

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

**COUNCIL OF THE GREAT CITY SCHOOLS**  
**Task Force on Urban School Leadership, Governance,  
Management, and Finance**

**2022-2023**

***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***

Jesus Jara, Clark County Superintendent  
Joyce Wilkerson, Philadelphia School Board

# **LEADERSHIP**



**Harold Border**  
Orange County Public Schools



**Arcelius Brickhouse**  
East Baton Rouge Parish Schools



**Jermaine Dawson**  
Birmingham City Schools



**Ebony Johnson**  
Tulsa Public Schools



**Brenda Larsen-Mitchell**  
Clark County School District



**Robert Moore**  
Jefferson County Public Schools



**Michael Ramirez**  
School District of Lee County



**Scott Schneider**  
Duval County Public Schools



**Matias Segura**  
Austin Independent School District



**David Zaid**  
Long Beach Unified School District

# The Michael Casserly Urban Executive Leadership Institute for Aspiring Superintendents

Welcome the first cohort of the Michael Casserly Institute for Aspiring Superintendents, an urban superintendency preparation program designed to prepare future-ready superintendents to serve as the chief executive officer of a member district of the Council of the Great City Schools.

NEWS...NEWS...NEWS...NEWS



**Council of the Great City Schools**

1331 Pennsylvania Ave, N.W., Suite 1100N, Washington, D.C. 20004

[cgcs.org](http://cgcs.org)

**FOR RELEASE**  
January 23, 2023

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## **Council Launches Leadership Development Program For Aspiring Urban Superintendents**

### *Investment Will Build a Pipeline of Future Urban School Leaders*

WASHINGTON, January 23 – The Council of the Great City Schools is launching an urban superintendent preparation program designed to prepare future-ready superintendents to serve as the chief executive officer of a member district of the Council.

The Michael Casserly Urban Executive Leadership Institute for Aspiring Superintendents, named after the Council’s longtime former executive director, will be led by Michael Hinojosa, the Council’s Superintendent-in-Residence. Prior to joining the Council, Hinojosa was the superintendent of the Dallas Independent School District where he worked to increase the number of people of color and women in the district’s leadership ranks.

Ten senior level administrators in urban school districts have been selected to participate in the first cohort, which will begin in February and end in October. The inaugural cohort is ethnically diverse, with seven of the participants being educators of color.

Cohort members will receive instruction from Hinojosa as well as current and former superintendents who have had a history of success and significant tenure in a Council school district. Meetings will be held in person and will cover such topics as school board relations, academics, operations, finances, and labor relations. The participants did not apply to the program, but were recommended through a rigorous nomination and selection process.

“The Michael Casserly Institute for Aspiring Superintendents will offer an intensive learning experience and a first-class professional development opportunity for senior-level executives who desire to become a superintendent,” said Hinojosa. “I’m very excited to give these participants an opportunity to receive valuable coaching and mentoring from successful superintendents who have been in the trenches and know what is needed to succeed in a tough environment. I truly believe that with the variety of tools and skillsets we will give them through the Institute, members of the cohort will be well-prepared to take the reins and improve the nation’s urban school systems.”

“The Council is excited to train the next generation of urban school leaders and establish a pipeline of talented and diverse big-city school educators,” said Council Executive Director Ray Hart. “I am excited by what lies ahead for the participants who comprise this inaugural cohort, and look forward to watching them succeed at the helm of our urban school districts and help our schoolchildren meet the highest educational standards, while reducing turnover in the superintendent ranks.”

At the end of the eight-month program, participants will receive a certificate of completion from the Council to be presented at the organization’s Annual Fall Conference in San Diego in October.

The members of the cohort are:

- Harold Border, Chief Strategy Officer, Orange County Public Schools
- Arcelius Brickhouse, Interim Chief of Schools, East Baton Rouge Parish Schools
- Jermaine Dawson, Chief Academic and Accountability Officer, Birmingham City Schools
- Ebony Johnson, Chief Learning Officer, Tulsa Public Schools
- Brenda Larsen-Mitchell, Deputy Superintendent of Schools, Clark County School District
- Robert Moore, Chief of Schools, Jefferson County Public Schools (KY)
- Michael Ramirez, Chief of Staff, School District of Lee County (FL)
- Scott Schneider, Chief of Schools, Duval County Public Schools (FL)
- Matias Segura, Interim Superintendent, Austin Independent School District
- David Zaid, Assistant Superintendent, Human Resource Services, Long Beach Unified School District

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### **About The Council of the Great City Schools**

The Council of the Great City Schools is the only national organization exclusively representing the needs of urban public schools. Composed of 78 large city school districts, its mission is to promote the cause of urban schools and to advocate for inner-city students through legislation, research and media relations. The organization also provides a network for school districts sharing common problems to exchange information, and to collectively address new challenges as they emerge to deliver the best possible education for urban youth. [www.cgcs.org](http://www.cgcs.org)

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**Michael Hinojosa, Ed.D.**  
**Superintendent-in-Residence**  
**Council of the Great City Schools**

[mhinojosa@cgcs.org](mailto:mhinojosa@cgcs.org)

cell 214.986.3978



# Media Relations: Long-Term

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- Build relationships with beat reporters
- Establish quarterly meetings with editorial board
- Return all calls promptly (you or one of your trusted team members)
- Never take a cold call (even from a “trusted reporter”)
- “Off the record” v. “Strategic Embargoed information”



# Media Relations: Long-Term

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- Board Operating Procedures establishes the Superintendent as Spokesperson for the District
  - Superintendent may delegate to Communications Department, as appropriate
  - Board Chair is the Spokesperson for the Board
  - Urban v. County v. Suburban
  - Namesake District-the Governor (and even the FBI) know who you are and what you are doing
  - Weekly inform Board of Media Contacts
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# Media Relations: Crises

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- You cannot talk your way out of things you (the district) behave yourself into
- Run to the Problem not Away from it
- Video (yikes) prep sessions
- Never use negative works (corruption v. accountability)
- Acknowledge (block and bridge)
- Develop a message and stick to it in a genuine manner

# Media Relations: Crises

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- Contact the Board Chair ASAP
- Never delegate relaying bad news; the leader must step up
- Get direction from Chair about informing the Board
- Execute Routines (Board weekly update v. Trustee notices v. staff calls v. superintendent calls)
- Anger, denial, grief, and, finally, acceptance

# Media Relations: Context Matters

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- Want to win the war, not every battle
- Know which hill to die on
- If everything is important, nothing is important
- There you go, trying to put logic into an illogical situation
- Best Practices from Saint Paul, Minnesota

# 3-2-1

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- Three things you learned
- Two things you liked
- One thing you are wondering about

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# Board Relations



# Board Relations

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- Meet with all Board Members regularly
- Board President weekly or bi-weekly at a minimum
- Lunch or other meeting with each and document
- Try to determine points of agreement
- Get to know their major issues
- Understand what drives them personally



# Board Team Relations

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- Understand Personality Dynamics
  - Driver, Expressive, Analytical, Amiable
- Schedule retreats/workshops to go deep on key topics
- Understand how coalitions develop on key issues
- Ensure the development of Board Operating Procedures

# Board Staff Relations

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- Know your context
- Know yourself and style
- Board Liaisons
  - Builds capacity in senior staff
  - Assigns one major point of contact for trustees
  - Ensures high quality efficacy of decision making

# Board Relations

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Student outcomes do not change until adult behaviors change!

# Board Relations - Not Linear

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- Not trained like you
- Hire the ones they like, fire the ones they don't
- Hired Hand
- Their money, their schools, their community
- Best Practices from Orlando, Florida

# 3-2-1



## List

Three things you learned.

Two things you liked.

One thing you are wondering about.

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# 3-2-1

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## List

Three things you learned.

Two things you liked.

One thing you are wondering about.

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# Labor Relations





# Labor Relations Hinojosisms

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- All the butts you kick on the way up you, will have to kiss on the way down.
- First class people hire first class people, second class people hire third class people.
- Change the people or change the people.
- You cannot fire them all, you need to fire them up; if they are burned out, at least they were once lit!

# Labor Relations Real Experts

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- **Dr. Jesus Jara, Clark County (Las Vegas)**
  
  
  
  
  
  
  
  
  
  
- **Dr. Joe Gothard, Saint Paul**

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**Michael Hinojosa, Ed.D.**  
**Superintendent-in-Residence**  
**Council of the Great City Schools**

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# Culture and Customer Service

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# Culture and Customer Service

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- Creating a welcoming district environment, good things happen by design not accident
- Culture trumps strategy, in fact it eats it for breakfast
- The leader cannot and should not delegate culture and climate
- The CEO is responsible and accountable for everything
- If everything is important nothing is important

# Culture and Customer Service: The Core 4

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- Focused on student achievement
- Flexible in the delivery of products and services
- Fast in the delivery of products and services
- Friendly in the approach to all

# The Core 4

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## Harvard Business School

- Seminar Strategic Perspectives in Non-Profit Management
- Case Study: Scandinavian Airlines, Chick-Fil-A, Ritz Carlton, formerly Southwest Airlines

# The Core 4 2.0

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## Tag Lines

- Focus: We transform students' lives
- Flexible: We strive for the yes
- Fast: Urgency for all
- Friendly: Make memorable moments



# The Core 4

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Applies to all divisions and departments

Applies to all schools

Measured annually

# The Core 4: Measure What You Treasure

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- Research and Evaluation conducts an annual survey around the Winter Break
- Designed around the Core 4
- Sent to all divisions, departments, and schools

# The Core 4: Survey

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Compiled

Analyzed

Reported

Shared with each Chief at January mid-year evaluation conference

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# The Core 4: Survey

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Shared with entire Senior Staff

Entire Report

Color Coded

Stack Ranked (percentiles)

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# The Core 4: Inspired

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- 300 Robotics Teams, Districtwide E-Sports
- Reset Centers replacing Suspensions
- Public School Choice
- P-Tech Pathways in Technology
- Career Institutes

# The Core 4: Inspired

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- Survey of staff, students, parents, taxpayers
- 20% of the superintendent's evaluation instrument
- Transformed the district from a culture of entitlement to a culture of accountability
- State approved local accountability system
- The student experience, goal to have every student involved in at least one extra-curricular activity

# Casserly Institute – Overview

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- Overview of program

# Casserly Institute – Cohort 1

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- Arcelius Brickhouse, Chief of Schools, East Baton Rouge Parish Schools
- Dr. Harold Border, Chief Strategy Officer, Orange County Public Schools
- Dr. Jermaine Dawson, Chief Academic and Accountability Officer, Birmingham City Schools
- Dr. Ebony Johnson, Chief Academic Officer, Tulsa Public Schools
- Robert Moore, Chief of Schools, Jefferson County Kentucky Public Schools
- Dr. Brenda Larsen-Mitchell, Deputy Superintendent, Clark County Public Schools
- Michael Ramirez, Chief of Staff, Lee County Florida Public Schools
- Scott Schneider, Chief of Schools, Duval County Public Schools
- Matias Segura, Interim Superintendent, Austin Independent School District
- David Zaid, Assistant Superintendent, Long Beach Unified School District



# **GOVERNANCE**

# 2023 SOFG Cohorts - Participant Details

## Effective School Board Cohort

Ideal for school board members serving on boards that haven't yet begun or have newly begun the SOFG journey

- Time Commitment:
  - Spring Cohort Sessions: 2nd and 4th Mondays, 2pm-4pm CT / Feb 13-Jun 12
  - Fall Cohort Sessions: 2nd and 4th Tuesdays, 2pm-4pm CT / Aug 8 -Dec 12
  - Total Hours: ~80hrs (cohort sessions + small groups + individual work)
- Spring Cohort Key Dates
  - Pre-Application Q&A Session: Dec 28
  - Application Due Date: 5pm CT, Jan 13
  - Application Interviews: Jan 7-20
  - Orientation Session: Jan 30
  - First Session: Feb 13
  - Opening Workshop: Feb 18-19 (Los Angeles)
- Fall Cohort Key Dates
  - Prerequisite: completion of Spring cohort (cost for the Fall session is waived if the Spring and Fall sessions are taken in the same year)
  - Pre-Application Q&A Session:
  - Application Due Date: 5pm CT, Jul 1
  - Application Interviews: Jul 2-20
  - Orientation Session: Aug 1
  - First Session: Aug 8
  - Pre-Conference Workshop: Oct 23-24 (San Diego)
- Costs:
  - Member Rate: \$3000 (travel not included)
  - Non-Member Rate: \$3500 (travel not included)

## School Board Implementation Cohort

Ideal for school board members serving on boards that have already adopted their Goals & Guardrails

- Time Commitment:
  - Spring Cohort Sessions: 2nd and 4th Mondays, 5pm-7pm CT / Feb 13-Jun 12
  - Fall Cohort Sessions: 2nd and 4th Tuesdays, 5pm-7pm CT / Aug 8-Dec 12
  - Total Hours: ~120hrs (cohort sessions + small groups + individual work)
- Spring Cohort Key Dates
  - Pre-Application Q&A Session: Dec 28
  - Application Due Date: 5pm CT, Jan 13
  - Application Interviews: Jan 7-20
  - Orientation Session: Jan 30
  - First Session: Feb 13
  - Opening Workshop: Feb 18-19 (Los Angeles)
- Fall Cohort Key Dates
  - Prerequisite: completion of Spring cohort (cost for the Fall session is waived if the Spring and Fall sessions are taken in the same year)
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  - Application Due Date: 5pm CT, Jul 1
  - Application Interviews: Jul 2-20
  - Orientation Session: Aug 1

- First Session: Aug 8
- Pre-Conference Workshop: Oct 23-24 (San Diego)
- Costs:
  - Member Rate: \$3000 (travel not included)
  - Non-Member Rate: \$3500 (travel not included)

## Effective Staff Member Cohort

Ideal for staff serving in districts where the school board hasn't yet begun or has newly begun the SOFG journey

- Time Commitment:
  - Spring Cohort Sessions: 1st and 3rd Mondays, 2pm-4pm CT / Feb 6-Jun 5
  - Fall Cohort Sessions: 1st and 3rd Mondays, 2pm-4pm CT / Aug 7-Dec 4
  - Total Hours: ~80hrs (cohort sessions + small groups + individual work)
- Spring Cohort Key Dates
  - Pre-Application Q&A Session: Dec 28
  - Application Due Date: 5pm CT, Jan 13
  - Application Interviews: Jan 7-20
  - Orientation Session: Jan 23
  - First Session: Feb 6
  - Opening Workshop: Feb 17 - 18 (Los Angeles)
- Fall Cohort Key Dates
  - Prerequisite: completion of Spring cohort (cost for the Fall session is waived if the Spring and Fall sessions are taken in the same year)
  - Pre-Application Q&A Session:
  - Application Due Date: 5pm CT, Jul 1
  - Application Interviews: Jul 2-20
  - Orientation Session: Jul 24
  - First Session: Aug 7
  - Pre-Conference Workshop: Oct 23-24 (San Diego)
- Costs:
  - Member Rate: \$3000 (travel not included)
  - Non-Member Rate: \$3500 (travel not included)

## Staff Member Implementation Cohort

Ideal for staff serving in districts where the school board has already adopted their Goals & Guardrails

- Time Commitment:
  - Spring Cohort Sessions: 1st and 3rd Mondays, 11am-1pm CT / Feb 6-Jun 5
  - Fall Cohort Sessions: 1st and 3rd Mondays, 11am-1pm CT / Aug 7-Dec 4
  - Total Hours: ~80hrs (cohort sessions + small groups + individual work)
- Spring Cohort Key Dates
  - Pre-Application Q&A Session: Dec 28
  - Application Due Date: 5pm CT, Jan 13
  - Application Interviews: Jan 7-20
  - Orientation Session: Jan 23
  - First Session: Feb 6
  - Opening Workshop: Feb 17 - 18 (Los Angeles)
- Fall Cohort Key Dates
  - Prerequisite: completion of Spring cohort (cost for the Fall session is waived if the Spring and Fall sessions are taken in the same year)
  - Pre-Application Q&A Session:

- Application Due Date: 5pm CT, Jul 1
- Application Interviews: Jul 2-20
- Orientation Session: Jul 24
- First Session: Aug 7
- Pre-Conference Workshop: Oct 23-24 (San Diego)
- Costs:
  - Member Rate: \$3000 (travel not included)
  - Non-Member Rate: \$3500 (travel not included)

Note: For the previous four cohorts, completion of a Spring session is a prerequisite for attending a Fall session, but completing them during the same year is not required. However, participants who do complete the Spring 2023 session prior to the start of the Fall 2023 session may attend the Fall 2023 session free of charge. Otherwise standard rates apply.

## **Advanced Governance & Coaching Cohort**

This is an incredibly grueling, time-, reading-, and writing-intensive course designed to prepare participants to guide school boards through SOFG implementation; also ideal for individuals who would like to pursue national school board coach certification

- Time Commitment:
  - Cohort Sessions: 2nd Thursdays, 5pm-8pm CT / Feb 9-Nov 9
  - Total Hours: ~300hrs (cohort sessions + small groups + individual work)
- Key Dates:
  - Pre-Application Q&A Session: Dec 28
  - Application Due Date: 5pm CT, Jan 13
  - Application Interviews: Jan 14-20
  - Orientation Session: Jan 26
  - First Session: Feb 9
  - Opening Workshop: Feb 18-19 (Los Angeles)
  - Pre-Conference Workshop: Oct 23-24 (San Diego)
- Costs:
  - Member Rate: \$4000 (travel not included)
  - Non-Member Rate: \$4500 (travel not included)

# CGCS Coach Client Fees

## Member Districts Rates

- \$10k per board for a 2-day workshop
- \$2k per day for non-PSA consulting or coaching
- \$40k initiation fee + contingency for full coaching PSA (covers two years)
- Cohort Participant Rates for Staff and/or Board Members
  - Basic & Intermediate Cohorts: \$3000
    - Basic cohorts are targeted at participants where the school board has not yet started down the SOFG path
    - Intermediate cohorts are targeted at participants where the school board has started down the SOFG path
  - Advanced Cohorts for: \$4000
    - Advanced cohorts are targeted at participants who want to guide others down the SOFG path

## Non-Member Rates

- \$20k per board for a 2-day workshop
- \$5k per day for non-PSA consulting or coaching
- \$100k initiation fee for full coaching PSA (covers two years)
- Cohort Participant Rates
  - Basic & Intermediate Cohorts: \$3500
    - Basic cohorts are targeted at participants where the school board has not yet started down the SOFG path
    - Intermediate cohorts are targeted at participants where the school board has started down the SOFG path
  - Advanced Cohorts: \$4500
    - Advanced cohorts are targeted at participants who want to guide others down the SOFG path

**MANAGEMENT SERVICES**



# Management Services Overview

## January 2023

### Management Services Department Goals/Priorities

The goal of the Management Services is to provide support to member districts in the areas of finance, human resources, information technology, and operations.

**Priority: Lead conferences for Management Services that educate, excite, and inspire its participants.**

**Connects to GOAL 2:** To lead, govern, and manage our urban public schools in ways that advance the education of our students and enhance the effectiveness and efficiency of our institutions.

➤ **Chief Operating Officer and Directors of Supporting Services Conference November 8-11, 2022, in New Orleans 250+ Attendees**

- Topics focused on key organizational and operational issues in facilities, food, safety, and transportation, including—
  - Diversity, equity, and inclusion
  - Legislative updates and ESSER Spending
  - Facility optimization model for declining enrollment
  - Reducing poverty without community displacement
  - Improve student outcomes through modernization of building technology
  - Cybersecurity, Business Continuity and Disaster Recovery
  - Succession planning
  - Bus routing and tiering to maximize student ridership and activity
  - Community Eligibility Provision (CEP)
  - Restorative justice approaches
  - Data based facility management and decision making

➤ **Chief Finance Officers, Human Resources, Purchasing, Risk Management and Internal Auditors Conference, April 14-17, 2023, in Los Angeles**

- Topics focusing on key issues, including--
  - Diversity, equity, and inclusion (DEI)
  - Investing in Your Workforce: Utilizing K-12 Teacher Engagement Surveys to Improve Staff Retention
  - Instituting Staffing Models: How to effectively implement a Comprehensive Staff Model

- Introduction to GFOA's Alliance for Excellence in School Budgeting and Smarter School Spending
- Value-Based Budgeting
- The 10-Step Treasury Management Program

➤ **Chief Information Officers, June 2023, in Denver**

**Priority: Increase member participation through value added services**

**Connects to GOAL 2:** To lead, govern, and manage our urban public schools in ways that advance the education of our students and enhance the effectiveness and efficiency of our institutions.

➤ **Associated Activities:**

- Actively engage with leaders throughout the functional areas (emails, text, surveys, etc.)
- Convenes Strategic Support Teams (SSTs) to provide technical support to member districts. SSTs will focus on the areas of organizational structure, staffing levels, human resources, facilities operations, maintenance and operations, budget and finance operations, information technology, safety and security, procurement, food services, and transportation.
- Actively recruit key leaders to participate
- Create processes and procedures to streamline associated activities
- Follow up with districts after SST to track implementation of recommendations
- Member spotlights of those districts doing exceptionally well in specific areas

➤ **Strategic Support Teams (SSTs)** are designed to provide a high-level review of a specific area of an organization. A team consists of practitioners who are either currently in leadership roles or those that previously served in senior roles for the function being reviewed.

➤ **SST Deployment October 2022 through June 2023**

- Boston Public Schools Safety – October 2022
- St. Louis Public Schools HR – October 2022
- Cincinnati Public Schools HR - March 2023
- Indianapolis Public Schools Operations - April 2023
- St. Louis Public Schools - May 2023
- Little Rock School District - TBD

➤ **District Requested Survey October 2022 through January 2023**  
(attached spreadsheet)



## **Priority: Build leadership capacity among district Management Services**

**Connects to GOAL 2:** To lead, govern, and manage our urban public schools in ways that advance the education of our students and enhance the effectiveness and efficiency of our institutions.

### ➤ **Associated Activities:**

- Monthly Job Alike Meetings - Job Alike meetings are intended to provide a forum for business units (facilities, transportation, safety & security, finance, IT, HR, etc.) across CGCS to receive updates on legislative matters, discuss issues that may be important to the members, and an opportunity to network to name a few. Leaders are welcomed to invite members of their teams that could benefit from the dialogue and/or growth opportunity. It's an offering that is intended to add value for member districts and participation is optional.
- Expand the Council's urban school executive's management training program to include chief operating officers, chief financial officers, human resource directors, chief information officers. The Michael Casserly Institute is a way to engage with leaders within organizations that have the potential and interest to lead at the next level. There are presently active participants in CFO and CIO tracts.

### **Casserly Institute**

**Reactivated the *Michael Casserly Urban School Executive Leadership Institute*** which is designed for individuals who meet the highest professional standards and have the attributes to assume senior executive positions as Chief Information and Chief Finance Officers to take on the challenges that large urban school districts face.

**MANAGEMENT SERVICES SURVEY RESULTS**

Date of Request	Requestor	District	Functional Area	Request/Inquiry
6/14/2022	Gregory Taylor	Dayton Public Schools	IT	Districts losing cyber insurance coverage due to companies dropping the service, raising the price, or adding new requirements (e.g., MFA for all employee
6/17/2022	Jeremy Vidito	Detroit Public Schools	IT	District is issuing an RFI for ERP systems and wanted to see what ERP systems other districts were using, so they could reach out to those companies and have
6/21/2022	Mark Stuckey	Pittsburgh Public Schools	IT	District device counts and warranty
7/1/2022	Curtis Timmons	Cleveland Metropolitan	IT	Tool/communication platforms for communicate with
7/5/2022	Jennifer Wall	Tulsa Public Schools	HR	Skilled, quality consultant with deep expertise in applicant tracking system architecture/roll-
6/17/2022	Crystal Cooper	Chicago Public Schools	Transportation	How districts administer Special Education (SPED)
6/13/2022	Joseph Albright	Jackson Public Schools	Safety	Need assistance in identifying a third-party firm that performs school security assessments.
6/28/2022	Sharon Reese	Portland Public Schools	HR	A member district is working on a proposal for a year-long PD for their cabinet. They are seeking partners/experts to provide leadership training for superintendent cabinet-level employees. In addition,
6/30/2022	Jenikka Oglesby	Birmingham City Schools	HR	I am looking to update the hiring process and the onboarding process for Birmingham City Schools. Please share any collateral, scoring rubrics and/or
7/7/2022	Aimee Green-Webb	Jefferson County Public School	HR	Do you have information on which if any council schools are going to mandate vaccination and or
7/8/2022	Jeffrey E. Thomas	Atlanta Public Schools	Facilities	Does a standard exists for elementary school playground equipment? What are other schools using?
7/11/2022	AJ Crabill/ Dr. Shonda Harris-Mohammed	Richmond Public Schools	Board	A few years ago the Council of Great City Schools completed an audit for Richmond City Schools. The school board will vote on July 18 to have an external audit completed of our Federal Stimulus funds. Is this something the Council can perform and if so, who do I

Date of Request	Requestor	District	Functional Area	Request/Inquiry
7/11/2022	Charles Burton	St. Louis Public Schools	HR	Board is requesting that the Council provide some guidance as it relates to crafting and implementation of a paid parental leave policy. We would like some understanding of what other Districts are doing on this subject, some draft language for a proposed policy and
7/11/2022	Aaron Walter	Detroit Public Schools	Transportation	1. How many weeks before the start of the school year does your District begin receiving your first student file? 2. How often do you get updates thereafter? 3. What routing software do you use? 4. What Student Information System do you use? 5. Does your District
7/14/2022	Nadine L. Mann	East Baton Rouge Parish School	Child Nutrition	A member district is interested in knowing whether other districts offer Latte's (8oz skim milk, coffee concentrate, unsweetened coffee flavoring) for
7/20/2022	Jeffrey E. Thomas	Atlanta Public Schools	Facilities	If a third party is leasing a portion of your school building, what property insurance, if any do you require the third party to provide? Full replacement cost of the building? Replacement Cost of the portion
7/23/2022	Aimee Green-Webb	Jefferson County Public Schools	HR	A member district is interested in learning if other districts offer telework options for employees, and
7/26/2022	Shane Searchwell	Palm Beach County Schools	Transportation	1. Does your local municipality provide free bus passes to High School Students? 2. If yes , how is it funded? 3. Does your District have a substitute pool of Bus
8/8/2022	Dr. Michael R. Akes, Akisha Osei Sarfo (GCGS)	Anchorage School District	Transportation	A member district is interested in knowing if other districts are facing a bus driver shortage, and if they are, what is the vacancy rate as a percentage of their
8/9/2022	Lakshmi S. Visvanath	Mephis-Shelby County Schools	IT	A member district is in the early stages of redesigning its public-facing website and internal site (intranet). It is interested in knowing what technology platform others use for each site, such as Blackboard for public-

Date of Request	Requestor	District	Functional Area	Request/Inquiry
8/11/2022	Cancy McArn	Sacramento City Unified School	HR	A member district is interested in learning how much districts of their size have paid to complete a
8/16/2022	Manish Naik	Legislative	Child Nutrition	A representative from Capitol Hill would like to obtain information about problems CGCS districts are having
8/17/2022	Jenikka Oglesby	Birmingham City Schools	HR	Can you inquire how many Districts have a designated position for certification and grow your on pathways? Also, can they please share the job description?
8/17/2022	Christine Shaw	Hawaii	IT	A member district is in the process of implementing Multi Factor Authentication and wishes to learn from others who have already implemented.
8/18/2022	Femi Aina	Atlanta Public Schools	IT	A member district is looking to benchmark their program with what other school districts are doing and especially would like to learn how schools handle devices that students do not return. <a href="http://tinyAPS.com/?1to1StudentDevProg">http://tinyAPS.com/?1to1StudentDevProg</a> (The survey will take about 3 minutes to complete). For districts interested in the live data, included is a link to the
8/22/2022	Monica Hogan	Boston Public Schools	Facilities	A member district is implementing a Systemic Improvement Plan. A deliverable is to "create and implement a coherent preventive/deferred maintenance plan" and is interested in obtaining
8/23/2022	Jessica Fry for Dr. Marilyn Delmont	Clark County School District	IT	have a dual toolset approach for email and productivity suites. Specifically Google and Microsoft. They are interested in seeing if/how other districts make a dual environment work.
8/26/2022	Ronald Applin	Atlanta Public Schools	Safety	A member district is interested in obtaining information on district screening processes and whether the function is performed with the use of a

Date of Request	Requestor	District	Functional Area	Request/Inquiry
8/25/2022	Eric Hileman	Oklahoma Ciity Public Schools	IT	A member district is interested in learning about staff copy counts. They refreshed their printer fleet recently and set teacher copy count limits to 1500 per month. They've had limits for several years but it seems they are getting a lot of requests to increase copy count
8/26/2022	Samuel Hurwitz	Dayton Public Schools	Facilities	A member district is looking for RFB/RFP for district wide mechanical services contract as well as
9/1/2022	John Shea	New York City Schools	Facilities	A member district is interested in learning about the current use of portable air filtration systems in
9/14/2022	Laura Tucholski	Hartford County Public Schools	Internal Audit	A member district is interested in knowing what school districts who have successfully completed
9/19/2022	Ashley Lally	Anchorage School District	Safety	A member district is interested in learning what other districts are doing regarding staff fob access during a lockdown. Any direction on how to do so would be
9/20/2022	Bill Wen	Orange County Public Schools	Transportation	In an effort to improve routing actual riders, a member district would like to see if any districts are having
10/3/2022	Jessica Fry	Clark County School District	IT	A member district is interested in learning if other districts have a position that is responsible and accountable for IT standards, policies, and procedures, as well as positions that are responsible for change
10/7/2022	Christina Aden	Indianapolis Public Schools	HR	Here at IPS we are trying to define a process for determining if a role is eligible for out of state remote hire. Can you ask the group if they are willing to share their remote hiringeligibility and or current process for
10/7/2022	Christina Aden	Indianapolis Public Schools	HR	I also am working to review our current chief of staff position description and pay. Is anyone willing to share their current chief of staff JD, salary and corresponding

Date of Request	Requestor	District	Functional Area	Request/Inquiry
10/28/2022	Jasmeen Shaw	Charleston County School Distr	Facilities	The Charleston County School District located in South Carolina are considering using delayed egress doors in Special Needs classrooms where the risk for elopement is high. The 2018 Building Code allows for the use of delayed egress panic hardware for group occupancy less than 50. I would like to find out if other school districts in the United States use delayed egress
10/11/2022	Salvador Pellerano	Providence Public School Distr	Facilities	1. Does the district reimburse staff for parking cost on regular work days (meaning excluding special events or trainings they may be sent to as part of their role)?a. If so, how is this done? b. If not, is there been rationale to back this up?2. What alternatives have districts adopted for handling parking needs?3. Any insight as to
10/13/2022	Patrick Zohn	Cleveland Metropolitan School	Facilities	First, what is your District Enrollment?Second, how School Buildings do you operate? (With the instruction
10/25/2022	Teresa Neff-Webste	Boston Public Schools	Safety	Unfortunately we have had incidents of violence involving guns and knives. These have increased the perceived level of threat in our schools and our Superintendent has tasked us with researching alternative measures of metal detection in partner school districts. I am wondering if there is a data set we can access around the following questions. 1. What age schools use some form of weapons detection (i.e: all

Date of Request	Requestor	District	Functional Area	Request/Inquiry
10/26/2022	Joe Phillips	Broward County Public Schools	IT	We are experiencing an issue where students and staff who perform a search in OneDrive or Sharepoint and select "all files" or "whole organization" are able to see files that have been shared with "anyone with the link" or "BCPS Employees with the link" even if the item was not shared with them, and they have never been sent the link. We found that items shared with these permissions are showing up in the "shared with everyone" folder. This is allowing students and staff to search and see sensitive items through this search feature. I have checked with a couple of other districts
	Alka Pateriya	CGCS	HR	A member district is interested in getting examples/information about career ladders that are in place in districts for interested employees to identify
	Joe Jennings	Tulsa Public Schools	IT	A member district is recently issued an RFP for a new AV system to support their board meetings. Their current system is a mix of different tools, (microphone system on XP, video cable encoders, Epson projector, Zoom, cameras for ASL, etc.). The system reviewed was in excess of \$300K for the solution. The member believed that the cost was unreasonable and is looking for feedback from other IT professionals with respect



Date of Request	Requestor	District	Functional Area	Request/Inquiry
	Bob Lyons	Sacramento City Unified School	IT	A member district is interested in creating a data centric infrastructure. Currently, all of their data systems are built for a particular context and purpose, but they are missing is the ability to recombine data for actionable insights in a graphically pleasing display to better understand the data. They are fighting data creep with multiple systems collecting data with seemingly no intersection between systems. They are interested in learning how other districts are creating a
11/29/2022	Matthias Wicks	Tulsa Public Schools	Safety	A member district is tasked to research and propose a plan to implement a drug K9 program that will randomly sniff for drugs at their middle and high schools. The district is interested in learning who has a
11/30/2022	Samuel Hurwitz	Dayton Public Schools	Facilities	A member district is seeking a source to purchase durable/vandal proof paper towel dispensers, soap dispensers, and other products that are difficult to pull
12/16/2022	Emily Nielson	Baltimore City Public Schools	HR	A member district is interested in collecting information on how teacher salaries and pathways are structured (i.e. step and lane vs. something else) in other districts. They are interested in learning more

Date of Request	Requestor	District	Functional Area	Request/Inquiry
1/11/2023	Sam Bays	Broward County Public Schools	Facilities	<p>A member district is working on a new project to replace the intercom systems in their district. A question has arisen regarding if using the intercom system to communicate lockdown drills, shelter-in-place, etc. requires the intercom systems to be reclassified as mass notification systems and fall under NFPA 72 24.5.25.1. This section states: "When a public address system is used to deliver mass notification messages, the public address system shall provide (either internally as a design feature or with an approved or listed external controller) for a signal to control the facility's fire alarm system for the purpose of deactivating the fire alarm audible and visual</p>

**BOSTON TRANSPORTATION REVIEW**



**Review of the**  
**Student Transportation Program**  
**of the**  
**Boston Public Schools**  
**September 2022**

The Boston Public Schools (BPS) requested that the Council of the Great City Schools (CGCS) provide a high-level management review of the District’s student transportation operations. Specifically, it was requested that the Council<sup>1</sup> --

- Evaluate the current BPS transportation system’s efficiencies, performance, equity, and costs; and
- Develop recommendations for route and schedule planning and optimization and update service parameters.

In response to this request, CGCS assembled a Strategic Support Team (SST) of highly experienced former and current school directors of transportation and business managers from major urban school districts to conduct the review. The team was composed of the following individuals. (Attachment A provides brief biographical sketches of the team members.)

Willie Burroughs  
Director, Management Services  
Council of the Great City Schools (Washington DC)

James Beekman  
General Manager  
Hillsborough County Public Schools (Florida)

Nathan Graf  
Senior Executive Director, Transportation & Vehicle Maintenance  
San Antonio Independent School District (Texas)

<sup>1</sup> 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 E lists the reviews that the Council has conducted.)

Adam Johnson  
Executive Director, Transportation  
Charlotte Mecklenburg Schools (North Carolina)

James Lynch  
Executive Director, Transportation  
Charleston County Public Schools (South Carolina)

Nicole Portee  
Assistant Superintendent  
Charlotte Mecklenburg Schools (North Carolina)

Edward Romero  
Director of Operations & Business Manager  
San Antonio Independent School District (Texas)

Trevis Sallis  
Executive Director, Student Transportation  
Omaha Public Schools (Nebraska)

Robert Carlson  
Senior Advisor  
Council of the Great City Schools (Washington DC)

The team reviewed documents, electronic student data provided by the district, and information from federal and state sources prior to a four-day site visit to Boston on September 18-21, 2022. 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 then Acting Superintendent, Drew Echelson; Assistant Superintendent, Data Strategy and Implementation, Monica Hogan; and the Executive Director of Transportation, Delavern Stanislaus during the evening of the first day of the site visit to discuss expectations and objectives for the review and make final adjustments to the work schedule. The team used the second and third days of the site visit to conduct interviews with key staff members (a list of individuals interviewed is included in Attachment C) and examine additional documents and data (a complete list of documents reviewed is included in Attachment D).<sup>2</sup>

The final day of the visit was devoted to synthesizing and refining the team's findings and recommendations and providing them to the incoming Superintendent, Mary Skipper; Acting

<sup>2</sup> The Council's reports are based on interviews with District staff and others, a review of documents, observations of operations, and professional judgment. The team conducting the interviews must rely on the willingness of those interviewed to be truthful and forthcoming but cannot always judge the accuracy of statements made by interviewees.

Superintendent, Drew Echelson; Deputy Superintendent of Operations, Samuel DePina; Chief Operations Officer, Indira Alvarez; Assistant Superintendent, Data Strategy and Implementation, Monica Hogan; and Delavern Stanislaus, Executive Director of Transportation.

The Council sent the draft of this document to the team members for their review to affirm the report's accuracy and to obtain their concurrence with the final recommendations. This management letter contains the findings and recommendations that the team has designed to help the district improve its transportation system to deliver efficient and effective transportation services that meet the evolving needs of all students.

## **Boston Public Schools**

Founded in 1657, the Boston Public Schools is the oldest public school system in America. Although BPS has experienced declining enrollment of 18,000 students since 2010, BPS remains the largest school district in Massachusetts.<sup>3</sup> Since 2020, four BPS schools have closed.

BPS currently educates approximately 46,001 students in 119 schools, including three attended solely by students with disabilities.<sup>4</sup> Like other large urban school districts, BPS has a diverse student population, which includes --

- 43.8 percent of the students are Latinx, 28.4 percent are Black, 15.1 percent are white, 8.7 percent are Asian, and 3.6 percent are multiracial (not Latinx);
- 31.9 percent of the students are English language learners;
- 69.8 percent of the students are economically disadvantaged; and
- 21.5 percent of the students receive special education services; 24 percent have Individualized Education Programs (IEP); 33.6 percent of all students with IEPs are English language learners; and 83 percent of all students with IEPs are economically disadvantaged.

## **Department of Transportation (DoT)**

The Executive Director of the Department of Transportation (DoT) reports to the Chief of Operations, who is one of nine direct reports through the Deputy Superintendent of Operations to

<sup>3</sup> Vaznis, James (November 18, 2021). "Boston Public Schools' enrollment drops below 50,000 students for the first time in decades". The Boston Globe.

Retrieved from <https://www.bostonglobe.com/2021/11/18/metro/boston-public-schools-enrollment-drops-below-50000-students-first-time/>.

<sup>4</sup> Students with disabilities who have individualized education programs (IEPs) are also referred to as students with IEPs. For this report, students with disabilities exclude those who are eligible for services under Section 504 of the Rehabilitation Act (Section 504), unless otherwise stated.

the Superintendent. In addition, the Executive Director of Transportation has seven direct reports, which include: an Assistant Director of Customer Relations and School Support who oversees a Customer Service Team (11 FTEs and up to 20 seasonal staff), Operations Coordinators (2 FTEs), and a Supplemental Transportation Manager; an Assistant Director of Bus Monitors who oversees Yard Managers (3 FTEs) and Operations Coordinators (6 FTEs) who supervise the Special Education Monitors who are assigned and paid for by the Department as well as a Customer Service team (3 FTEs) and is supported by an HR Manager (1 FTE) and Program Directors for ABA (2 FTEs); an Assistant Director of Finance, who with three Account Clerks oversee the departments Finance; an Assistant Director of Contract and Fleet Operations; an Assistant Director.<sup>5</sup>

BPS operates its transportation services under circumstances that are significantly different compared to other similarly sized urban school districts, which may explain why it has one of the highest transportation costs in the nation, according to a 2020 study.<sup>6</sup> For example,

- BPS transports approximately 21,500 students to 242 sites, including 105 non-BPS charters and private, parochial, and out-of-district special education schools, which equates to over 43,000 miles daily (including home-to-school, athletic and after-school activities).
- The district sets annual calendars and daily schedules for BPS schools, but the calendars and daily schedules for non-BPS schools are designated by various governing boards resulting in challenges that include --
  - Annual calendars and daily schedules require transportation from as early as the second week of August through the last week of June for all schools;
  - The BPS routing system<sup>7</sup> has 24 different morning bell times, 20 different mid-day bell times, and 29 different afternoon bell times;
  - Non-BPS schools schedule half-days or “early-outs” at their discretion with no regard to system-wide scheduling or available resources; and
  - Many special education schools are in session year-round, which causes “regular” school year calendars to overlap with summer programming for BPS and charter schools.
- The team learned in interviews that over the past five years, there has been a 70 percent increase in students whose IEP/504 plans require bus monitors who are hired, managed, routed, dispatched, and paid as district employees.

<sup>5</sup> Source: [https://drive.google.com/file/d/175GrRaPYp5j3f7j6\\_JuR-RyFfgG9SSqE/view?usp=share\\_link](https://drive.google.com/file/d/175GrRaPYp5j3f7j6_JuR-RyFfgG9SSqE/view?usp=share_link)

<sup>6</sup> Source: <https://www.bostonherald.com/2020/02/24/boston-second-most-expensive-school-bus-ride-after-buffalo/>

<sup>7</sup> Source: Department Overview - [https://docs.google.com/document/d/1H7r3DgOSI2gBw5yF1sRAIYLg8vIRd8IE/edit?usp=share\\_link&oid=100629812210175846543&rtpof=true&sd=true](https://docs.google.com/document/d/1H7r3DgOSI2gBw5yF1sRAIYLg8vIRd8IE/edit?usp=share_link&oid=100629812210175846543&rtpof=true&sd=true)

- District school assignment policies result in many students traversing the city each day rather than utilizing neighborhood schools, thus increasing the number of buses on the road at any given time.
- The district’s routing system is challenged by the lack of timely and accurate student, school, and special education data, which changes rapidly from August into September each year. In addition, this practice exacerbates BPS’s ability to finalize the driver bid by mid-August to meet contractual requirements.
- The district’s Department of Transportation (DoT) maintains and operates its yellow bus fleet through a school bus vendor contract.<sup>8</sup> The contract between DoT and its vendor operates differently from other similarly sized public school districts in the United States. It also operates differently than other districts that maintain or operate their yellow bus fleet through vendors. As a result, the costs for providing these services have increased by \$24.2 million (16.9%) since FY 2018-2019 and is \$143.3 million or 10.7% of the district’s total budget for the 2022-2023 school year.
- The City/District is required to utilize the specific driver workforce regardless of which transportation vendor is under contract with the City/District to provide transportation operations services.
- While the City/District can change vendors as often as is feasible, the same front-line employees (drivers, mechanics, operations), under the same collective bargaining agreement (CBA) terms and conditions of employment, led by the same union leadership, will remain in place and dictate, to a large extent, the way BPS DoT operates. This remains true regardless of whether the City/District brings transportation in-house.

## **Background Information**

A report<sup>9</sup> released by the Massachusetts Department of Elementary and Secondary Education (DESE) in March 2020 highlighted serious challenges and inadequacies across a broad range of district functions, which included “poorly run operational functions, such as transportation and facilities management that were interfering with student learning.” The report was later updated in May 2022<sup>10</sup> and led to a Systemic Improvement Plan (SIP),<sup>11</sup> jointly signed by the Mayor of

<sup>8</sup> Source: Request for Proposals (RFP) #824 – December 3, 2012 Source:

[https://drive.google.com/file/d/11dFq49F4SwzevWskmAzIGapHnYFbe9Jd/view?usp=share\\_link](https://drive.google.com/file/d/11dFq49F4SwzevWskmAzIGapHnYFbe9Jd/view?usp=share_link)

<sup>9</sup> Source:

[https://docs.google.com/document/d/1EEVxvpOkO9ruvdGKKEE0xHsASLdweCvz/edit?usp=share\\_link&oid=100629812210175846543&rtpof=true&sd=true](https://docs.google.com/document/d/1EEVxvpOkO9ruvdGKKEE0xHsASLdweCvz/edit?usp=share_link&oid=100629812210175846543&rtpof=true&sd=true)

<sup>10</sup> Source: <https://www.doe.mass.edu/accountability/district-review/nolevel/2022-0035.pdf>

<sup>11</sup> Source:

<https://www.bostonpublicschools.org/cms/lib/MA01906464/Centricity/Domain/3031/BPSSIPSigned%20FINAL.pdf>



Boston and representatives from BPS and accepted by the Massachusetts Department of Elementary and Secondary Education (DESE). This SIP outlined a series of initiatives intended to create a safe, effective, and responsive school transportation system, with immediate reforms to improve on-time school bus arrival rates and eliminate uncovered trips (i.e., trips that are scheduled but not run). The agreed-upon initiatives included:<sup>12</sup>

- Immediately begin implementing the operational reforms negotiated between BPS and the school bus drivers' union, ratified<sup>13</sup> by the union on May 24, 2022, to improve on-time arrivals and eliminate uncovered trips.
- Achieving a districtwide school bus on-time arrival rate of 95% or better for all scheduled trips each month.
- Ensuring 99% of BPS school buses will arrive at school within 15 minutes of the start of the school day.
- Reporting on-time arrival rates to DESE each month, beginning in August 2022 (to capture information inclusive of all trips, including approved special education trips, charter school trips, and any uncovered trips).
- By August 15, 2022, launch a diagnostic evaluation of the current BPS transportation system to analyze efficiency, performance, equity, and cost. In addition, the diagnostic should yield recommendations for route, schedule planning, optimization, and updated service parameters.

## **Key Findings and Recommendations**

The findings and recommendations in this Management Letter are limited to overarching issues. The BPS transportation team should focus on those improvement efforts that, if appropriately and timely addressed, could have an impact leading to improvements in the services provided by the BPS Department of Transportation.

### **Commendations**

- The Council notes that BPS retained a senior manager with extensive experience managing school bus service operations in a large urban school district. In addition, the senior manager conducted an audit in 2019 that ran parallel to many of the findings in the state report. The written report<sup>14</sup> was submitted in April 2020. The audit led to a superintendent's directive

<sup>12</sup> Source:

<https://www.bostonpublicschools.org/cms/lib/MA01906464/Centricity/Domain/3031/BPSSIPSigned%20FINAL.pdf>, p.3.

<sup>13</sup> Source: [https://drive.google.com/file/d/1E3idB92Dbubf4dOzKR6KE9N9MSSGXgPg/view?usp=share\\_link](https://drive.google.com/file/d/1E3idB92Dbubf4dOzKR6KE9N9MSSGXgPg/view?usp=share_link)

<sup>14</sup> Source: <https://docs.google.com/document/d/1Lj5VmFkh-Ren8bghB3OPDRWtvdPkp8xm/edit> - Boston Public Schools Department of Transportation Business Plan SY2020 – 2024

and subsequent action plan in May 2020 to address transportation service issues in critical areas, including high-performing bus operations, communication, customer service, and vendor and BPS office operational performance. While the onset of the COVID-19 Pandemic may have delayed some of the actions, and while some of the messaging and follow-up, including performance measures, may have been marginal, the Team saw evidence that the reforms within BPS DoT domain have been pursued. However, there are additional further recommendations where the team did not see evidence that BPS had made progress.

- The DoT has been reorganized, and the management team appeared to be laser-focused and dedicated to improving efficiencies and controlling costs.
- The team was told that the district's Office of Internal Audit recognized the transportation compliance office for a no-errors found ("perfect") audit relative to state reporting.
- District retained an outside consultant to address the current RFP for material weaknesses and created language in the Invitation For Bid (IFB) to manage them.
- DoT was responsive to information requests before, during, and following the site visit.

## **LEADERSHIP**

### **Findings**

- The team saw no evidence that the costs driving BPS to have one of the highest transportation costs in the nation<sup>15</sup> are granularly tracked or differentiated by useful categories. The FY21 BPS Business Plan<sup>16</sup> reported that 2020 regular education riders cost \$966 more than the benchmark, and special education riders cost \$3,398 more than the benchmark. However, BPS does not collect data such as bus utilization rates and other rider information that inform these costs. This data is essential for identifying opportunities to reduce costs and providing accurate estimates for future academic program initiatives requiring district-provided transportation. Categories typically tracked include, but are not limited to --
  - School type (BPS, charter, out of district, etc.),
  - Students Transported Out of Zone (see, for example, Exhibit 1),
  - Ridership and average bus utilization rates (projected and actual riders vs. bus capacity),

<sup>15</sup> Source: <https://www.bostonherald.com/2020/02/24/boston-second-most-expensive-school-bus-ride-after-buffalo/>

<sup>16</sup> Source: <https://docs.google.com/document/d/1Lj5VmFkh-Ren8bghB3OPDRWtvdPkp8xm/edit> - Boston Public Schools Department of Transportation Business Plan SY2020 – 2024

- Eligibility type (more than 1.5 miles to the school of attendance, within 1.5 miles of the school of attendance),<sup>17</sup>
  - Program type (school choice, students with disabilities, homeless, foster, etc.), and
  - Type (mode) of transportation.
- The Department of Transportation lacked a formalized process to monitor and effectively utilize ridership and current bus capacity data throughout the school year to create opportunities for cost containment or reducing transportation costs.
  - The Department of Transportation relies on self-reporting by drivers to determine when stops should be eliminated, as well as the names and number of students no longer riding the bus. Unfortunately, this methodology becomes a disincentive to drivers to accurately report ridership numbers and stop counts in fear of reducing their hours or losing their preferred route assignment.

## **Recommendations**

1. Implement a consistent 3-tier bell schedule districtwide<sup>18</sup> – Adopting staggered school start times can help ensure that the district’s buses can serve as many students as possible (i.e., maximize the district’s average bus utilization). There will likely be resistance to moving away from what has existed for a long time. Still, it is a best practice within the student transportation industry to operate under a multi-tier system. Variations in school starting and ending times increase the transportation system’s complexity and limit the time available for efficient routing. Changes to bell schedules, while not easy, are essential to improving on-time performance. This will positively impact the cost of operating transportation services, increase fleet utilization, and improve on-time performance. Effective implementation will require meaningful stakeholder engagement. A communication plan outlining stakeholder groups, engagement opportunities, and timelines should be developed.
2. Routinely update all policies and procedures and regularly review and update routes to maximize fleet utilization.

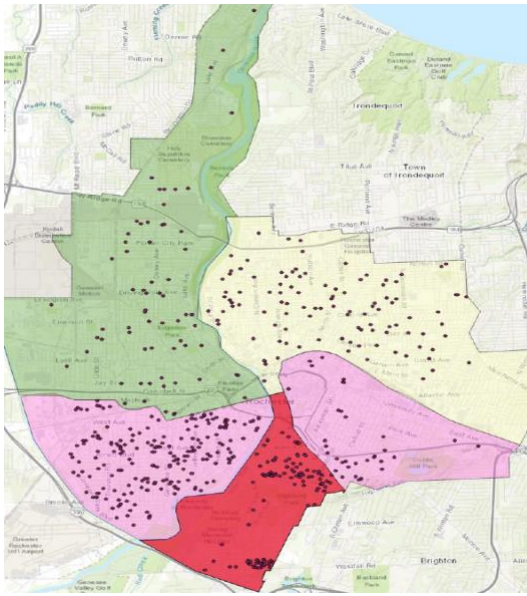
<sup>17</sup> BPS provides transportation for K-5 students who live more than 1 mile from school and 6th grade students who live more than 1.5 miles from school. State requirement is that districts provide transportation for students who are more than 2 miles from school (Source: Eligibility Requirements [https://drive.google.com/file/d/1\\_TswSZYtVZfi8wvWcD7SpISxEr1wPT0d/view?usp=share\\_link](https://drive.google.com/file/d/1_TswSZYtVZfi8wvWcD7SpISxEr1wPT0d/view?usp=share_link))

<sup>18</sup> Currently there is a 3-tier schedule for BPS, but not all schools adhere to it. The BPS routing system has 19 different morning bell times, 16 different mid-day bell times, and 25 different afternoon bell times;

3. Continue to use a systematic approach to create and update routes (including computer routing) and bus stops that are effective and cost-efficient without compromising safety.
4. Identify and fiscally quantify opportunities to reduce transportation costs by maximizing or increasing --
  - a. Walk-to-stop distances,
  - b. Walk-to-school distances,
  - c. Average ride time,
  - d. Earliest pickup time,
  - e. Bus loads and seat utilization,
  - f. Tiering<sup>19</sup>, and
  - g. The opportunity to simultaneously transport students to two nearby schools on the same bus, such as an elementary school with a nearby middle school.
5. Design a DoT strategy for monitoring actual ridership throughout the school year to aggressively identify stops, runs, and routes that could be consolidated or eliminated.
6. Establish cross-collaboration with school systems outside of BPS that receive transportation services to align calendars and schedules to the maximum extent possible.
7. Strengthen internal fiscal and management controls by tracking the per pupil and per bus/van vehicle costs for all services provided. Regularly monitor and trend this data for anomalies, cost/budget projections, and opportunities to reduce costs. Consider tracking costs by --
  - a. School enrollment type (BPS school, charter school, non-public school);
  - b. Mode of transportation (district-owned contractor-operated school bus, contracted van, public transit (MTBS), and in lieu of transportation (payment to parent));
  - c. Length of transportation (students transported from schools in one area of the district to schools in other areas of the district as in Exhibit 1);

<sup>19</sup> Tier (also known as a bus trip) is one component of a bus route. A bus route is comprised of multiple bus trips, such as one, two, or three trips in the morning transporting students to school, and one, two, or three trips in the afternoon returning students to their home or home areas.

Exhibit 1. Example of Students Transported from the Green and Yellow Zones to a Red Zone School



- d. Eligibility<sup>20</sup> (students that live 1.5 miles or more to their school of attendance and transported students that live less than 1.5 miles to their school of attendance);
- e. Program (general education, Students with Disabilities, McKinney-Vento, foster care, early education, etc.). Also, separately track and cost the transportation of --
  - i. Students with Disabilities, McKinney-Vento, foster care, and early education students that are transported --
    - a) Door to door,
    - b) Corner to corner (or school to school),

<sup>20</sup> Students attending Public Schools must meet a mileage requirement for their grade and also be attending a school within their home base/zone. The mileage requirement is based on the walking distance between the student's home address and assigned school. The student must live at least the distance below within their grade category to qualify for transportation to one of their home base schools: Grade K-5: 1 mile or more; Grade 6: 1.5 miles or more; Grade 7-12: All students eligible for an M7 (An M7 is a prepaid T Pass for the school year that remains active at all times, including the weekends. All students in grades 7-12 living and attending school in the City of Boston who do not receive door-to-door bus service are eligible for an M7 regardless of their distance from school).

- c) By van,
- d) By single vehicle,
- ii. McKinney-Vento and foster care students, separated by --
  - a) Name of the pickup Local Education Agency (LEA),<sup>21</sup>
  - b) Name of the receiving school LEA,
  - c) Students transported on a school bus,
  - d) Students transported on MTBS, and
  - e) Students transported by other means.

## **STUDENT ASSIGNMENTS, ENROLLMENTS, AND ROUTING**

### **Findings**

- The student assignment process creates significant delays in getting students into the classroom. Delays were a key finding during the recent review and in previous assessments. In addition, DESE reported that BPS had not made progress in tackling systemic barriers to district improvement, such as overhauling the school assignment system or securing significant changes to the transportation contract, which was a major barrier to dependable transportation services for all students<sup>22</sup>. For example --
  - The team heard from several interviewees that the school assignment plan and program placement impacted DoT services, e.g., SPED placements (time and distance to provide required services) and multiple school choices for students; and
  - The team was told that the transportation data team does not have the necessary access to improve SIS programs – an implicit choke point between IT, transportation, and special education that limits program improvements, collaboration, and cooperation.
- There was no indication that a formal interdepartmental annual route planning timeline existed that integrated input from essential stakeholder offices. These offices typically include Special Education, Welcome Services, Technology (OIT), Expanded Learning Team, Communications, Safety Services, Department of Transportation, Athletics, State and Federal Programs, and other departments impacting transportation as appropriate. As a result --

<sup>21</sup> Local Education Agency (LEA) is a commonly used synonym for a school district.

<sup>22</sup> <https://www.doe.mass.edu/accountability/district-review/nolevel/2022-0035.pdf>, p.4-5

- There was no established and agreed-upon annual route planning timeline that impacted stakeholders developed;
- The agreed-upon final date that critical student data would be sent to transportation to begin summer and fall routing appears to be out of sync with the need. The team observations revealed that the data is needed earlier in the routing process to determine projected bus, driver, and bus monitor needs;
- The team was told that due to summer staffing practices, there is a student routing backlog that occurs after determining projected bus, driver, and bus monitor needs;
- Routes were built on eligibility rather than actual average ridership, which resulted in additional buses and unnecessary costs;
- Downloads between BPS and the contractor can add up to 2 weeks before students receive service;<sup>23</sup>
- SPED does not provide accurate or timely roll-over of student IEP data, including --
  - Special equipment (harness),
  - Monitor requirements;
- The school assignment plan and program placement have negative impacts on DoT services, including --
  - SPED placements (time and distance to provide required services),
  - Multiple school choices for students;
- There is a lack of coordination between SPED & DoT, resulting in inconsistent eligibility requirements and a significant increase in monitor assignments impacting on-time arrivals, overall inefficiencies, and increased costs; To illustrate --
  - The district's Individualized Education Program (IEP) software does not sync with the district's Student Information System (SIS) software (transportation eligibility information from the IEP / 504 plan does not automatically update transportation records) - BPS Transportation has to perform a weekly manual analysis to ensure

<sup>23</sup> **General Overview of Routing Process:** 1. Data is sent to the routing system nightly from the district's student information system nightly. 2. For every transportation eligible student, a request is made for their inbound and outbound trips. These requests are routed by the routing team. 3. Every Thursday, the routing program database is transmitted to the bus contractor via secure file transfer protocol (SFTP). The routing is effective the following Wednesday.

student IEP information is correct in the routing database (door-to-door and monitor needs);

- Special Education Out of District (OOD) placement and transportation data have historically been an issue. A September 2022 review of the 88 OOD students assigned to a BPS yellow bus for the start of the school year revealed that ten students did not require transportation for various reasons;
- Fall bid timeline - Fall bid data must be sent to the contractor by early/mid-August, which means BPS needs the majority of student data for routing to be accurate and complete by early August; To illustrate --
  - The contractor needs at least a week to process the bid data;
  - Bid letters must be sent to drivers two weeks prior to the bid;
  - Route sheets must contractually be posted at least three working days before the bid;
  - Time for dry runs (now contractually required);
  - Fall service needs to start the last week of August due to many charter schools with earlier start dates;
  - The vendor does not have direct access to the routing program (RP);
- A transportation confirmation process is lacking in the enrollment process. For example, the 2000 students who enrolled in summer 2022 were expected to require services. However, not all 2000 students needed school bus service, which created inefficiencies and increased costs providing buses for students that did not materialize;
- BPS is limited in its ability to integrate and pass information across systems resulting in manual entries that cause errors, delays, and challenges with student assignments and transportation services; and
- BPS provides transportation to 103 non-BPS schools (charters, Out of District, and parochial) that utilize multiple Student Information Systems (SIS) that do not communicate with the BPS routing systems.
- There are apparent shortcomings in the current routing process, as the vendor receives weekly route updates but does not have access to routing program (RP) software, which causes delays in updating routes. As a result, drivers are currently using hard-copy route descriptions.
- BPS does not effectively manage its athletic transportation program resulting in canceled athletic events and creating a disconnect between students and parents.



## Recommendations

1. Create a committee of leaders from the Departments of Transportation (DoT) and the Department of Special Education (SPED) to confer on issues of mutual concern. At a minimum, these discussions should cover --
  - a. The feasibility of moving the hiring, assigning, oversight, and budget for the school bus monitors from the DoT to the Department of Special Education to better match individual student needs with monitor skills and training.
  - b. Establishing when a DoT representative should be present at an IEP meeting to discuss specialized equipment or services a student might require.
2. Commence a comprehensive review of all routing practices and processes to identify opportunities to improve routing outcomes and route efficiency. To move forward, BPS should --
  - a. Establish an annual interdepartmental routing timeline committee to develop appropriate and acceptable deadlines for submitting data and completing tasks. This committee shall comprise key staff from Special Education, Welcome Services, Technology (OIIT), Excellence for All, Communications, Safety Services, Department of Transportation, State and Federal Programs, and others as appropriate. The committee shall ensure that --
    - i. Routing staff has sufficient time to prepare summer and fall routes that are efficient and cost-effective;
    - ii. The entire routing process is mapped, and timelines are set or revised, to maximize the completion of routing and minimize the number of unrouted students prior to determining projected bus, driver, and bus monitor needs.
    - iii. The timeline includes adequate time for recruiting/hiring/training drivers and monitors, completing and reviewing backgrounds and driving records, dry run(s), and vehicle maintenance in preparation for the start of the school year;
    - iv. The BPS Department of Communications is invited to participate in recruitment opportunities and job fairs by leveraging mass communication systems and social media approaches. Consider inviting parents and family members to join the BPS “team;”
    - v. The Department of Transportation is engaged early in the process to evaluate any service or fiscal impact of proposed changes to bell schedules, program placements, or new academic initiatives;
    - vi. The agreed-upon cutoff date for finalizing routes is enforced before the opening of school;

- vii. Contractors receive routes on time and can review routing and provide feedback before the opening of school;
  - viii. Student routing information provided to school sites before the opening of school is received timely and presented in a clear and understandable format; and
  - ix. Adjust all employee contracts as needed so that they are in alignment with efficiencies identified in the state’s findings and this management letter;
- b. Meet regularly with charter and non-public school administrators to share areas of concern, improve communication, and create opportunities to enhance service levels and expectations;
  - c. Use, to the greatest extent possible, the previous school year’s ending routing configuration as the starting point for next year’s routing. Build routes based on historical knowledge and experience, not total eligibility. During this transition in routing schema, allow for up to 15 percent contingency seating/space and perform adjustments, if necessary;
  - d. Review routing policies and practices to collectively maximize ride times, earliest pickup times, the number of students on each bus (load counts and seat utilization), walk to stop distances, and the number of stops on each run to reduce the number of runs, buses, vans, and single vehicles used;
  - e. Review (annually) all transported students that live within 1.5 miles of their school of attendance for required transportation appropriateness, if the same hazardous conditions still exist, and that each student’s transportation eligibility is consistent with current board policy;<sup>24</sup>
  - f. Provide current and possible future routing staff refresher and optimization training of the district’s routing software;
  - g. Consider identifying an existing Department of Transportation employee or onboarding a new employee to maintain the electronic map used for routing and routing simulations. This person should become a “superuser” in the general use of the routing software. Invest in appropriate training provided by the software vendor to ensure competency;
  - h. Develop routing simulations and optimizations utilizing a test database to identify potential efficiencies in advance of and throughout the routing process;

<sup>24</sup> With few exceptions (i.e., students with disabilities), BPS does not receive state reimbursement allocation funding for students transported that live within 1.5 miles of their school of attendance

- i. Integrate, to the greatest extent possible, students from all transportation programs (BPS, charter, parochial) on the same buses;
- j. Create a quality control review process that will ensure, before implementation, all runs and routes are evaluated as viable, efficient, and within guidelines. Adjust routes as necessary before employing; and
- k. Acquire and use technologies to improve operations, access to information and communications, e.g. --
  - i. Installation of data tablets on buses for access to real-time information,
  - ii. Expand district messaging and SIS software to include transportation data, and
  - iii. Revise the DoT website to be more interactive and linked to other BPS applications.

## MANAGEMENT

### Finding:

- City/District transportation services significantly and inequitably affect student learning. On-time bus arrival rates remain unacceptably low, and uncovered routes can affect thousands of students monthly. Many students whose morning bus routes are uncovered do not attend school that day, and students with disabilities are disproportionately affected.<sup>25</sup>
- DESE found that high-quality transportation services to BPS students, key performance indicators identified by the district and its vendor were not effectively addressed, including the performance issues exacerbated by the current Collective Bargaining Agreement, which expired at the time of the review.<sup>26</sup> For example --
  - Pass-through costs are not managed effectively,
  - Quarterly performance reviews were not being performed,
  - Annual financial reviews were not conducted, and
  - Ligated damages were amended and not aligned with the standard terms and conditions of the contract.

<sup>25</sup> Source: <https://www.doe.mass.edu/accountability/district-review/nolevel/2022-0035.pdf>, p.16

<sup>26</sup> Source: <https://www.doe.mass.edu/accountability/district-review/nolevel/2022-0035.pdf>, p. 108

- The Systemic Improvement Plan<sup>27</sup> provides specific measures and targets for the priority initiatives, including that the district will achieve a districtwide school bus on-time rate of 95 percent each month and for the school year overall. This measure refers to the percentage of buses that arrive before the opening bell. BPS is not currently meeting this performance goal.
- DoT has not linked its modern call center to the vendor or retained a multi-linguist that could provide a higher level of customer service to parents and administrators when there are missed bus stops.
- DoT has not scheduled a customer service survey since November 2021.

## **Recommendations**

1. Update and fully implement the comprehensive business plan<sup>28</sup> with goals, objectives, benchmarks, performance, accountabilities, and costs that support the district’s strategic plan. The plan shall include timelines and process descriptions. The team recommends BPS implement this plan as a part of its overall student transportation strategy. At a minimum, it should ensure the following activities --
  - a. A departmental business plan linked to the BPS vision and strategic plan;
  - b. After collecting bus utilization rates and other recommended data, assess additional yearly cost-savings initiatives and recommendations;
  - c. Identification of all new or moved program placements and policy changes;
  - d. Annual route planning, including the timely receipt of student data;
  - e. Timely routing, procurement of all services connected to transportation (e.g., route bidding), and release of routing information;
  - f. Budget development;
  - g. Fleet replacement;
  - h. Training and professional development;
  - i. Technology and program initiatives;

<sup>27</sup> Source:

<https://www.bostonpublicschools.org/cms/lib/MA01906464/Centricity/Domain/3031/BPSSIPSigned%20FINAL.pdf>, p.3

<sup>28</sup> Source: <https://docs.google.com/document/d/1Lj5VmFkh-Ren8bghB3OPDRWtvdPkp8xm/edit> - Boston Public Schools Department of Transportation Business Plan SY2020 – 2024

- j. Defined performance measures, including KPIs and industry standards for all primary functions of the department, and manager accountability for these measures; and
  - k. Employee performance appraisal and evaluation for all DoT staff.
2. Create an effective communications system throughout the DoT organization, including communications channels up and down and side to side that involves regular meetings at each level with specific agendas, documented minutes of discussions, decisions, and follow-up activities. Require the attendance of key operations staff at these meetings. Both teams should submit agenda items, so employees know --
    - a. The department's goals and objectives and how they will be achieved;
    - b. How will employees be held accountable for and be evaluated on the goals; and
    - c. Managers and supervisors are held accountable for ensuring that information is decimated throughout the organization and feedback is passed back to the organization.
  3. Implement a system for tracking progress and measuring outcomes on all initiatives.
  4. The IFB seems to do a thorough job of defining service and performance requirements, interface structure and mechanisms, oversight process, etc. Ensure that the contract includes performance indicators that address on-time bus performance that is easily measured and hold the vendor and its staff directly accountable for providing dependable student service. Performance measurements should include, but are not limited to --
    - a. On-time performance,
    - b. Missed trips,
    - c. Maintenance/vehicle inspection results, and
    - d. Monthly financial and statistical reporting adherence.
  5. Collaborate with city officials to address any shortfalls in the Collective Bargaining Agreement.

## ATTACHMENT A. STRATEGIC SUPPORT TEAM

### **Willie Burroughs**

**Willie Burroughs**, a veteran school business official, was recently named Director of Management Services for the Council of the Great City Schools. In this position, he will conduct strategic support teams and manage operational reviews for superintendents and senior managers; convene annual meetings of chief financial officers, chief operating officers, human resources directors, chief information officers and technology directors; and field requests for management information. Prior to joining the Council, Burroughs served as the COO for the San Antonio Independent School District, heading the operations services division with more than 1,600 employees. He also served in the Dallas Independent School District as executive director with responsibilities for maintenance, HVAC, grounds, environmental services, custodial, capital improvement, and energy management. In addition, Burroughs held a number of positions with the Houston Independent School District for nearly 11 years, including general manager of construction services (bond), senior manager of contract administration, and senior manager of special projects. Burroughs holds a Bachelor of Science degree in industrial engineering and an MBA from Clemson University. He was commissioned as an officer in the United States Army Signal Corps.

### **James Beekman**

**James Beekman** is the General Manager of Transportation for Hillsborough County (Florida) Public Schools (HCPS). HCPS is currently the 7<sup>th</sup> largest school district in the nation servicing over 220,000 students. Mr. Beekman began his career in student transportation in 1983 and has been in a leadership role since 1989. He has been active in the Florida Association of Pupil Transportation where he serves as President and has chaired numerous committees in both operations, fleet and school bus specifications. He was recognized by School Bus Fleet Magazine as the national 2014 Administrator of the Year. In his role at HCPS, he directs the daily operation of Transportation Services which transports over 90,000 students daily on 837 routes that cover an annual total of 17 million miles. In addition to yellow bus, Transportation Services also maintains over 600 vehicles in its white fleet used by a variety of departments in the District. He is a graduate of Florida Southern College in Lakeland with a B.S. in Business.

### **Nathan Graf**

**Nathan Graf** has been the Senior Executive Director of Transportation and Vehicle Maintenance for the San Antonio Independent School District since March 2017. Mr. Graf earned a master's degree in business administration (M.B.A.) from The University of Texas at Austin, earning the distinction of a Sord Honors Graduate. He also earned a B.S. in Psychology from The University of Houston, graduating with Honors. Mr. Graf served for 15 years in various management roles, each with increasing responsibility, for The Houston Independent School District (HISD); 9 of these years were in transportation. Under his leadership both HISD and SAISD have earned many industry awards and recognition for the efficiency and

effectiveness of their transportation services from organizations such as The Council of the Great City Schools, The 100 Best Fleets in the Americas, The City of Houston, The City of San Antonio, the Propane Education and Research Council, District Administration Magazine, Telly Awards, School Transportation News and School Bus Fleet Magazine. He has authored and managed many grants worth several million dollars to introduce propane school buses into both the HISD and SAISD fleets. Since March 2017 about 40% of SAISD route buses are now fueled by propane and SAISD is the only school district in Bexar County to have 100% of route buses that have Wi-Fi, interior and exterior cameras, GPS, and a parent school bus tracking app. Mr. Graf believes passionately in building a strong and energetic team that encourages innovative ideas that come to life such as the SAISD Rolling Reader Program, the School Bus Stop Arm Camera Program, the Clean Green Yellow School Bus Machines Program, and SAISD Eats Meal Delivery Buses.

### **Nicole Portee**

**Nicole Portee** serves as the Assistant Superintendent of Operations for the Charlotte Mecklenburg Schools (CMS) in Charlotte North Carolina. CMS is the 17<sup>th</sup> largest school district in the United States where she supports operations. Mrs. Portee also served as Senior Executive Director of Operations at Guilford County Schools and Executive Director of Transportation for Denver Public Schools. Under her leadership the transportation department was honored for the launch of its innovative school bus shuttle system, the Success Express. The department also received a Gold Peak Award for “New Product or Service Launch”. She served on a 25-member group to evaluate recommend changes to the Regional Transportation District’s pass programs and on the City of Denver 2017 GO bond stakeholder committee responsible for examining the capital facilities and infrastructure needs of Denver and making, project recommendations for bond funding. As a distinguished leader Mrs. Portee was named Administrator of the year in 2018 by School Transportation News, recognized 14 Phenomenal Women in School Transportation, one of the Fascinating Personalities and continues to be recognized by various organizations for her leadership and outstanding out of the box thinking. Nicole served as the President of the Colorado State Pupil Transportation Association (CSPTA) along with a host of other positions. Nicole received her degree at American Intercontinental University and Colorado State University.

### **Adam Johnson**

**Adam Johnson** started his career in pupil transportation at age 19, Adam drove a school bus to put himself through college and graduated from UNC-Chapel Hill with a degree in Public Relations and Spanish. In 2001, he then accepted a new position as Transportation Specialist in Moore County, North Carolina, and then Charlotte-Mecklenburg Schools in 2002. At age 29, he was named Director of Transportation for Union County Public Schools and served there and then ultimately returned to Charlotte-Mecklenburg Schools as Executive Director of Transportation in 2018. Johnson currently oversees a fleet of nearly 1,300 vehicles, including 950 daily school buses that transport approximately 75,000 students.

### **Trevis C. Sallis**

**Trevis C. Sallis** is the Executive Director of Student Transportation for the Omaha Public School District (OPS). Mr. Sallis has served in a senior management position with the District for 24 years. OPS is the largest school district in the state of Nebraska. Mr. Sallis oversees an operation that supports a school district of approximately 53,000 students, where 20,000 students are transported daily. Mr. Sallis is a graduate of the University of Nebraska at Omaha with both a B.S. and M.S. in Urban Studies with an emphasis in Education. Under Mr. Sallis' leadership, OPS transferred the entire regular education fleet to liquid propane buses. This initiative was a major impact to the city and the district's "Go Green Initiative Plan". Mr. Sallis is actively involved in the Nebraska Student Transportation Association and the Mayor's appointed "Vision Zero City Committee." The goal of the committee is to build a culture in the city where safety for all road users is always top priority

### **James Lynch**

**James Lynch** is the Executive Director of Student Transportation for Charleston County (South Carolina) School District (CCSD). CCSD is currently the 2<sup>nd</sup> largest school district in South Carolina servicing over 49,000 students. Mr. Lynch is a retired Connecticut State Police Sergeant with more than 20 years of leadership experience, holding various positions with investigative units, emergency planning, and management. In March of 2017 he relocated to Charleston, South Carolina, where he accepted an Operations Manager position with CCSD. As the Operations Manager, he was responsible for daily operational activities of the transportation vendor, ensuring contract compliance and resolving evolving transportation issues. In January of 2020 he was named Executive Director of Student Transportation for CCSD. In March of 2020, Mr Lynch was responsible for the transition of bus vendors during the onset of the COVID pandemic. He has been active in the South Carolina Association of Pupil Transportation where he served as Region Director and was assigned to fleet and school bus specifications committees. CCSD represents a unique blend of urban, suburban, and rural schools spanning 1,300 square miles along the coast. CCSD serves approximately 49,000 students in 88 schools and specialized programs. In his role at CCSD, he directs the daily operation of Transportation Services which transports over 20,000 students daily on 372 routes with two tiers of service, and 5,300 bus stops. He is a graduate of the University of Connecticut in Storrs with a B.A. in Communications.

### **Edward Romero**

**Edward Romero** is the Executive Director of Operations & Business Services for the San Antonio Independent School District and holds over 17 years of school district experience in K-12 business operations. He has served in the role of Director of Purchasing & Risk Management for Southside ISD, Business Consultant for Region 20 Education Service Center, and Lead Buyer for Edgewood ISD. Edward has served as an elected official for the Edgewood Independent School District Board of Trustees and is currently an active member of the Alamo Area Association of School Business Officials, Texas Association of School Business Officials, and National Institute of Governmental Purchasing.



Edward's commitment to service includes mentorship, community service, and supporting non-profit organizations such as the Compadres for Scholarships, Region 20 Lions Club, FIRST Tech Challenge and Robotics Competition.

### **Dr. Robert "Bob" Carlson**

**Robert Carlson** is Senior Advisor for 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, Human Resources Directors, and Chief Information Officers and Technology Directors; fields requests for management information; and has developed and maintains a Web-based management library. Prior to joining the Council, Robert was an executive assistant in the Office of the Superintendent of the District of Columbia Public Schools. He holds doctoral and master's degrees in administration from The Catholic University of America; a bachelor's 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.

## ATTACHMENT B. WORKING AGENDA

### CGCS Strategic Support/Technical Assistance Team

#### Transportation Review

Boston Public Schools

September 18-21

**Contact: Delavern Stanislaus**

Director of Transportation

dstanislaus@bostonpublicschools.org

6:15

**Team to Meet in Hotel Lobby**

6:30

**Dinner Meeting**

Bar Mezzana

360 Harrison Avenue

Boston, MA 02118

617-530-1770

<https://www.barmezzana.com/>

**Dr. Drew Echelson**

Acting Superintendent

*Tentative* **Mary Skipper**

Incoming Superintendent

**Monica Hogan**

Assistant Superintendent,

Data Strategy &

Implementation

**Del Stanislaus**

Director of Transportation

#### **Monday, September 19**

7:30 - 8:30

Team Continental Breakfast & Working Session

8:45 - 9:30

**Team Interview**

**Dr. Sam DePina**

Deputy Superintendent, Operations

**Indy Alvarez**

Chief Operations Officer

**Teresa Neff-Webster**

Deputy Chief Operations Officer

**Delavern Stanislaus**

Director, Transportation

9:45 - 10:45

**Team Interview**

**Daniel Rosengard**

Ass. Dir. of Cust Rel & School Support

11:00 – 12:00

**Team Interview**

**Emanuel Zanzerkia**

12:00 - 1:00 Working Luncheon

1:00 - 2:00 **Team Interview** **Shanda Williams**  
Ass. Dir. of Routing and Planning

2:15 - 3:15 **Team Interviews** **Jacqueline Hayes**  
Fleet & Compliance Manager

3:30 - 4:15 **Team Interviews** **Mark Racine**  
Chief Information Officer  
**Eric Hankwitz**  
IT Director of Applications  
**Monica Hogan**  
Assistant Superintendent,  
Data Strategy &  
Implementation

4:45 - 5:15 p.m. Group Team Working Session

**Tuesday, September 20**

7:00 - 7:45 **Team Continental Breakfast**  
Conference Room TBD

8:00 - 9:00 **Team Interview** **James Folk**  
General Manager

9:15 - 10:00 **Team Interview** **Nathan Kuder**  
Chief Financial Officer  
**David Bloom**  
Deputy Chief Financial Officer  
**Jamie Racanelli**  
Director, Planning & Analysis

10:15 - 10:45 **Team Interviews** **Barry Kaufman**  
Senior Systems Manager,  
Welcome Services

11:00 - 11:45 **Team Interview** **Varsha Ramsumair**  
*focus on monitors unit* **Asst. Dir. of Monitors Unit**  
**Delavern Stanislaus**  
**Emanuel Zanzerkia**

**Asst. Dir. of Data Management**

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

12:15 - 1:00	Team Interview	Naveen Reddy Business Manager
1:00 - 1:30	<b>Team Interviews</b>	<b><u>Kristin Dearden</u></b> Student Support Services Transportation Project Manager
1:45 - 2:15	<b>Team Interviews</b>	<b><u>Shanda Williams</u></b> <b><u>Roudcha Serizer</u></b> Transportation Officer
2:30 - 3:15	<b>Team Interview</b>	<b><u>Monica Hogan</u></b> <b><u>Amy Goodnough</u></b> Special Education Data Analyst
3:30 - 4:15	<b>Team Interview</b>	<b>Lauren Viviani</b> Interim Asst Superintendent, Special Education
4:30 - 5:00	<b>Team Interviews</b>	<b><u>Tommy Welch</u></b>  <b><u>Mary Driscoll</u></b> School Superintendent

4:45 - 5:15 p.m. Group Team Working Session

**Wednesday, September 21**

7:00 - 7:30	<b>Team Continental Breakfast</b>	
7:30 - 12:00	<b>Team Working Meeting</b>	<b>Synthesis of Findings &amp; Recommendations</b>
12:00 - 1:00	<b>Team Working Luncheon &amp; Debriefing</b>	<b><u>Drew Echelson</u></b> Acting Superintendent <b><u>Monica Hogan</u></b> Assistant Superintendent, Data Strategy & Implementation

**Delavern Stanislaus**  
Director of Transportation

**Adjournment & Departures**

## **ATTACHMENT C. DISTRICT PERSONNEL INTERVIEWED**

Dr. Mary Skipper, Incoming Superintendent  
Dr. Drew Echelson, Acting Superintendent  
Monica Hogan, Assistant Superintendent, Data Strategy & Implementation  
Del Stanislaus, Director of Transportation  
Dr. Sam DePina, Deputy Superintendent, Operations  
Indy Alvarez, Chief Operations Officer  
Teresa Neff-Webster, Deputy Chief Operations Officer  
Daniel Rosengard, Assistant Director of Customer Relations & School Support  
Emanuel Zanzerkia, Assistant Director of Data Management for Transportation  
Shanda Williams, Assistant Director of Routing and Planning  
Jacqueline Hayes, Assistant Director of Contract and Fleet Operations  
Mark Racine, Chief Information Officer  
Eric Hankwitz, IT Director of Applications  
James Folk General Manager  
Nathan Kuder, Chief Financial Officer  
David Bloom, Deputy Chief Financial Officer  
Jamie Racanelli, Director, Planning & Analysis  
Naveen Reddy, Business Manager  
Barry Kaufman, Senior Systems Manager, Welcome Services  
Varsha Ramsumair, Assistant Director of the Monitors Unit  
Kristin Dearden, Student Support Services Transportation Project Manager  
Roudcha Serizer, Transportation Officer  
Amy Goodnough, Special Education Data Analyst  
Lauren Viviani, Interim Assistant Superintendent, Special Education  
Tommy Welch, School Superintendent  
Mary Driscoll, School Superintendent

## ATTACHMENT D. DOCUMENTS REVIEWED

- Massachusetts Department of Elementary and Secondary Education Boston Public Schools Comprehensive Review Conducted September 30 – November 7, 2019 -
- Boston Public Schools Follow-Up District Review Report dated May 23, 2022
- Boston Public Schools Systemic Improvement Plan dated June 27, 2022
- Systemic Improvement Plan Project Scope: Transportation Diagnostic Evaluation
- Collective Bargaining Agreement (CBA)
- Letter A
- Letter B
- Invitation For Bid (IFB)
- Department of Transportation Annual Budgets
  - FY21
  - FY22
  - FY23
- BPS Transportation Action Plan presentation dated May 22, 2020
- Safe Routes To School Boston Strategic Plan
- Bus Footage Standard Operating Procedure
- Transdev BPS AM Dispatch Checklist
- Transdev BPS PM Dispatch Checklist
- AM Operations Checklist
- PM Operations Checklist
- Transdev BPS AM Yard Supervisor Checklist
- Transdev BPS PM Yard Supervisor Checklist
- Team Lead Checklist (AM)
- Team Lead Checklist (PM)
- BPS DOT Routing Guidelines – SY22-23 Reopening
- Department Overview
- Eligibility Requirements
- Boston Public Schools Department Of Transportation Business Plan SY2020 – 2024
- Playbook – February 2021
- COVID Health Safety Protocol November 2021
- School Messenger How-To & Scripts
- Serious Incident SOP (BPS OPS)
- Superintendent Transportation Update dated December 21, 2021
- Training and Onboarding Resources
- Training Guide (SY22-23)
- Transdev Audit Results/Improvements 08-11-2022
- Transdev Org Chart 8.16.22

- TRN-1\_Schedule of School Hours\_2022-2023
- TRN-02 Student Transportation Safety\_Discipline SY22
- TRN-3 Athletics and Field Trips SY16
- Washington PM 2021-2022
- Transportation Review Observations & Findings dated November 21, 2019
- Transdev RFP 167-RP-12-1 BPS Contracts – 2012 RFP
- TD MPR Update\_NOV 2022
- F10 BPS Improvement Prioritization\_YEAR IN REVIEW\_KPIS 11.16.21



## ATTACHMENT E. COUNCIL REVIEWS

The Council of the Great City Schools is a coalition of 70 of the nation’s largest urban public-school systems. 105 The organization’s Board of Directors is composed of the superintendent, CEO, or chancellor of schools and one school board member from each member city. An executive committee of 24 individuals, equally divided in number between superintendents and school board members, provides regular oversight of the 501(c)(3) organization. The composition of the organization makes it the only independent national group representing the governing and administrative leadership of urban education and the only association whose sole purpose revolves around urban schooling.

The mission of the Council is to advocate for urban public education and to assist its members in to improve and reform. The Council provides services to its members in the areas of legislation, research, communications, curriculum and instruction, and management. The group also convenes two major conferences each year; conducts studies of urban school conditions and trends; and operates ongoing networks of senior school district managers with responsibilities for areas such as federal programs, operations, finance, personnel, communications, instruction, research, and technology. Finally, the organization informs the nation’s policymakers, the media, and the public of the successes and challenges of schools in the nation’s Great Cities. Urban school leaders from across the country use the organization as a source of information and an umbrella for their joint activities and concerns.

The Council was founded in 1956 and incorporated in 1961 and has its headquarters in Washington, DC. Since the organization’s founding, geographic, ethnic, language, and cultural diversity has typified the Council’s membership and staff.

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

City	Area	Year
Atlanta	Special Education	2015
	Human Resources	2016
	Facilities	2009
	Transportation	2010
	Classified Staffing	2019
	Teaching and Learning	2020
	Student Support Services	2021
Aurora	Information Technology	2019
Austin	Special Education	2010
Baltimore	Information Technology	2011
Birmingham	Organizational Structure	2007
	Operations	2008
	Facilities	2010
	Human Resources	2014
	Financial Operations	2015
Boston	Special Education	2009
	Curriculum & Instruction	2014
	Food Service	2014
	Facilities	2016
	Special Education	2022
	Safety and Security	2022
	Transportation	2022
Bridgeport	Transportation	2012
Broward County (FL)	Information Technology	2000
	Food Services	2009
	Transportation	2009
	Information Technology	2012
	Information Technology	2018
	Facilities Operations	2019
	Information Technology	2022
Buffalo		

City	Area	Year
	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
	Information Technology	2022
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

City	Area	Year	
	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	
Denver	Organizational Structure	2017	
	Superintendent Support	2001	
	Personnel	2001	
	Curriculum and Instruction	2005	
	Bilingual Education	2006	
	Curriculum and Instruction	2008	
	Common Core Implementation	2014	
	Des Moines		

City	Area	Year
	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
East Baton Rouge	Human Resources	2021
	Special Education	2022
	Bilingual Education	2022
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

City	Area	Year
Houston	Procurement	2005
	Special Education	2012
	Transportation	2015
	Facilities Operations	2010
	Capitol Program	2010
	Information Technology	2011
Indianapolis	Procurement	2011
	Finance	2021
	Transportation	2007
	Information Technology	2010
Jackson (MS)	Finance and Budget	2013
	Finance	2018
	Bond Referendum	2006
	Communications	2009
Jacksonville	Curriculum and Instruction	2017
	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
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

City	Area	Year
	Curriculum and Instruction	2016
	Information Technology	2022
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

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



City	Area	Year
	Human Resource	2009
	Special Education	2009
	Transportation	2014
	Curriculum and Instruction	2019
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

City	Area	Year
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
	Human Resources	2022
	Operations	2022
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		

City	Area	Year
	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

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# Boston Public Schools



## Transportation Strategic Support Team Overview

Ray Hart and Willie Burroughs

January 11, 2023

# Agenda

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- **Overview**
- **Leadership**
- **Student Assignments, Enrollment, and Routing**
- **Management**
- **Questions and Answers**

# Overall Key Findings

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- The district sets annual calendars and daily schedules for BPS schools, but the calendars and daily schedules for non-BPS schools are designated by various governing boards resulting in challenges that include:
  - A BPS routing system that has 24 different morning bell times, 20 different mid-day bell times, and 29 different afternoon bell times
  - Non-BPS schools that schedule half-days or “early-outs” at their discretion with no regard to system-wide scheduling or available resources

# Overall Key Findings

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- District school assignment policies result in many students traversing the city each day rather than utilizing neighborhood schools - increasing the number of buses on the road at any given time
- Over five years, there has been a 70 percent increase in students whose IEP/504 plans require bus monitors

# Overall Key Findings

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- The City/District is required to utilize the specific driver workforce regardless of which transportation vendor is under contract with the City/District to provide transportation operations services
  - While the City/District can change vendors as often as is feasible, the same front-line employees (drivers, mechanics, operations), under the same collective bargaining agreement (CBA) terms and conditions of employment, led by the same union leadership, will remain in place and dictate, to a large extent, the way BPS DoT operates. This remains true regardless of whether the City/District brings transportation in-house.
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# Leadership

# Key Findings - Commendations

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- Strong Department of Transportation (DoT) Leadership
- DoT Business Plan
- DoT management team appeared to be laser-focused and dedicated to improving efficiencies and controlling costs
- DoT was responsive to information requests before, during, and following the site visit
- Currently there is a 3-tier schedule for BPS, but not all schools adhere to it

# Key Findings – Data Collection

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- Inefficiencies in BPS transportation are not granularly tracked or differentiated by useful categories
  - Categories typically tracked elsewhere include, but are not limited to -
    - School type (BPS, charter, out of district, etc.)
    - Students Transported Out of Zone
    - Ridership and average bus utilization rates (projected and actual riders vs. bus capacity)
    - Eligibility type (more than 1.5 miles to the school of attendance, within 1.5 miles of the school of attendance)
-

# Recommendations

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- Implement a consistent 3-tier bell schedule districtwide
- Routinely update all policies and procedures and regularly review and update routes to maximize fleet utilization
- Identify and fiscally quantify opportunities to increase efficiencies by reviewing -
  - Walk-to-stop distances
  - Walk-to-school distances
  - Average ride time
  - Earliest pickup time
  - Bus loads and seat utilization, and
  - Tiering

# Recommendations

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- Strengthen internal fiscal and management controls by tracking the per pupil and per bus/van vehicle costs for all services provided
- Simultaneously transport students to nearby schools on the same bus, such as an elementary school with a nearby middle school
- Design a DoT strategy for monitoring actual ridership throughout the school year to aggressively identify stops, runs, and routes for consolidation or elimination
- Establish cross-collaboration with school systems outside of BPS that receive transportation services to align calendars and schedules to the maximum extent possible

# Student Assignments, Enrollment, and Routing

# Key Findings

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- School assignment plans and program placements impact DoT services
- Student information system (SIS) connection to transportation programs
- Interdepartmental annual route planning with key stakeholders
- Routes built on eligibility rather than actual average ridership
- Final date that critical student data sent to transportation to begin summer and fall routing appears to be out of sync with the need
- Lack of coordination between special education & DoT
- SIS communication between BPS and 103 non-BPS schools

# Recommendations

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- Improve formal communications between special education and the DoT
  - Commence a comprehensive review of all routing practices and processes to identify opportunities to improve routing outcomes and route efficiency
  - Meet regularly with charter and non-public school administrators to share areas of concern, improve communication
  - Use, to the greatest extent possible, the previous school year's ending routing configuration
  - Review all routing policies and practices
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# Management

# Key Findings

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- DESE found that high-quality transportation services to BPS students and key performance indicators identified by the district and its vendor were not effectively addressed
- DoT has not linked its modern call center to the vendor or retained a multi-linguist that could provide a higher level of customer service to parents and administrators when there are missed bus stops

# Recommendations

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- Update and fully implement the comprehensive business plan to include goals, objectives, benchmarks, performance, accountabilities, and costs
- Create an effective communications system throughout the DoT organization, including communications channels up and down and side to side that involves regular meetings at each level with specific agendas, documented minutes of discussions, decisions, and follow-up activities
- Resume the annual DoT customer service survey

# Recommendations

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- The IFB seems to do a thorough job of defining service and performance requirements, interface structure and mechanisms, oversight process, etc. Ensure that the contract includes performance indicators that address on-time bus performance that is easily measured and hold the vendor and its staff directly accountable for providing dependable student service. Performance measurements should include, but are not limited to –
  - On-time performance,
  - Missed trips,
  - Maintenance/vehicle inspection results, and
  - Monthly financial and statistical reporting adherence

# Thank You Questions and Answers

**ROCHESTER OPERATIONS REVIEW**



# Review of Multiple Operations Functions of the Rochester City School District

**June 2022**

Dr. Leslie Myers-Small, Superintendent of the Rochester City School District, requested that the Council of the Great City Schools (CGCS) provide a high-level management review of the Facilities, Finance, Procurement, and Transportation functions of the district. Specifically, it was asked that the Council<sup>1</sup> --

- Identify opportunities to reduce or contain the fiscal impact on the Office of Operations budget as the district manages the challenges of declining enrollment;
- Review and evaluate the leadership and management, organization, and operations of each function reviewed to identify opportunities to streamline processes, implement industry best practices, improve existing procedures and internal controls, and strengthen internal and external communications to enhance customer service; and
- Develop recommendations to assist the departments in achieving greater operational and managerial efficiency, oversight, and effectiveness to increase their strategic value to the district.

In response to this request, the Council assembled a Strategic Support Team (the team) of senior managers with extensive experience in facilities, finance, procurement, and transportation operations from other major urban city school systems. The team was composed of the following individuals. (Attachment A provides brief biographical sketches of the team members.)

Raymond Hart  
Executive Director  
Council of the Great City Schools (Washington, D.C.)

Willie Burroughs, Project Director  
Director, Management Services  
Council of the Great City Schools (Washington, D.C.)

<sup>1</sup> 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 I lists the reviews that the Council has conducted.)

David Palmer, Principal Investigator  
Deputy Director (Retired)  
Los Angeles Unified School District (California)

Gary Appenfelder  
Director of Purchasing (Retired)  
Metropolitan Nashville Public Schools (Tennessee)

Sam Bays  
Executive Director, Capital Programs Management  
Broward County Public Schools (Florida)

Alex Belanger  
Assistant Superintendent, Facilities  
Fresno Unified School District

Kris Hafezizadeh  
Executive Director of Transportation & Vehicle Services  
Austin Independent School District (Texas)

Nathan Graf  
Senior Executive Director, Transportation and Vehicle Maintenance  
San Antonio Independent School District

Judith Marte  
Deputy Superintendent, Operations  
Broward County Public Schools (Florida)

Kathi Hayward Redricks  
Executive Director, Operations Business (Retired)  
Dallas Independent School District (Texas)

Robert Waremburg  
Senior Director, Procurement Services  
Orange County Public Schools (Florida)

The team reviewed documents provided by the district during a four-day site visit to Rochester, New York, on June 27-30, 2022. 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 Superintendent Myers-Small, Deputy Superintendent of Operations Dr. Genelle Morris, and



Chief of Schools Dr. Carmine Peluso<sup>2</sup> 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, visit schools and bus parking facilities, 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).<sup>3</sup>

The final day of the visit was devoted to synthesizing and refining the team's findings and recommendations and providing the Superintendent and the Deputy Superintendent of Operations with a briefing on the team's preliminary findings.

The Council sent the draft of this document to the team members for their review to affirm the report's accuracy and obtain their concurrence with the final recommendations. This management letter contains the findings and recommendations that the team has designed to help improve the operational efficiencies and effectiveness of the Rochester City School District.

### **State Education Department Appoints Monitor**

The RCSD had been struggling for over a decade, with six superintendents and ten chief financial officers in conjunction with many local and state efforts to improve the district's performance. Student outcomes did not improve during this period, and the district's graduation rate suffered significantly. As a result, Chapter 56 of the Laws of 2020 required the appointment of a Monitor to the RCSD to provide oversight, guidance, and technical assistance related to the academic and fiscal policies, practices, programs, and decisions of the district and the Board of Education. The State Monitor (the monitor) has been in place since May 2020, and the monitor's duties include being a non-voting ex-officio member of the Board of Education.<sup>4</sup> In addition, the monitor is engaged in the selection of senior staff, as described below --

- ***Executive Cabinet Staff:*** The Monitor will be invited to participate in all selection processes for any vacancy on the Superintendent's Executive Cabinet and will provide feedback to the superintendent, in addition to participating in the final selection committee;

<sup>2</sup> Effective July 11, 2022, Dr. Peluso became the Deputy Superintendent of Operations as Dr. Morris accepted the position of superintendent at another district.

<sup>3</sup> The Council's reports are based on interviews with District staff and others, a review of documents, observations of operations, and professional judgment. The team conducting the interviews must rely on the willingness of those interviewed to be truthful and forthcoming but cannot always judge the accuracy of statements made by interviewees.

<sup>4</sup> Source:

<https://www.rcsdk12.org/site/default.aspx?PageType=3&DomainID=1&ModuleInstanceID=63347&ViewID=6446EE88-D30C-497E-9316-3F8874B3E108&RenderLoc=0&FlexDataID=73707&PageID=1>, and <https://www.rcsdk12.org/site/handlers/filedownload.ashx?moduleinstanceid=76467&dataid=86820&FileName=Aca%20dem%20Plan%2012.10.2021.pdf>, p.4.

- *School Principals:* The Monitor will be invited to participate in the selection process for any receivership school principalship and provide the superintendent feedback. The monitor will join the superintendent in the final interview with the recommended candidate. In instances where principals are transferred to lead receivership schools, the monitor will be invited to participate in transfer discussion meetings and will provide feedback directly to the superintendent; and
- *Other Central Office Leaders:* The Monitor will be invited to participate in the selection process for any other central office leader with direct supervision responsibilities over receivership schools and provide feedback to the superintendent. The monitor will join the superintendent in the final interview with the recommended candidate.

### **Rochester City School District**

The Rochester City School District (RCSD), the fourth-largest school district in the State of New York<sup>5</sup>, operates 55 pre-kindergarten (Pre-K) sites, 46 schools (31 primary school buildings and 15 secondary school buildings),<sup>6</sup> and ten (10) alternative programs. The district covers a geographic area of nearly 36 square miles<sup>7</sup> and serves a diverse K-12 downward trending student population of 22,350 students,<sup>8</sup> supported by nearly 5,600 employees, of which approximately 3,100 were classroom teachers.<sup>9</sup> Exhibit 1 below displays seven (7) years of enrollment history and projected enrollment through FY2027.<sup>10</sup> Exhibit 2 below displays RCSD staffing history back to FY2016-2017.<sup>11</sup>

<sup>5</sup> Source: <https://data.nysed.gov/downloads.php> and <https://www.rcsdk12.org/domain/8>. The RCSD recently dropped from third to fourth in the NY state enrollment ranking. The team was told that the continued loss of enrollment is due, in part, to students leaving RCSD for charter and private schools. Specifically, 2,317 RCSD resident students attend 105 private and Parochial /Urban Suburban Schools (as of 10/22/21), and 6,806 students attend 14 charter schools (as of 2/10/22).

<sup>6</sup> Source: RCSD Department of Facilities - *Facilities Services Handbook*, Revised June 2022, pp.8-9.

<sup>7</sup> Source: <http://www.usa.com/rank/new-york-state--land-area--school-district-rank.htm>.

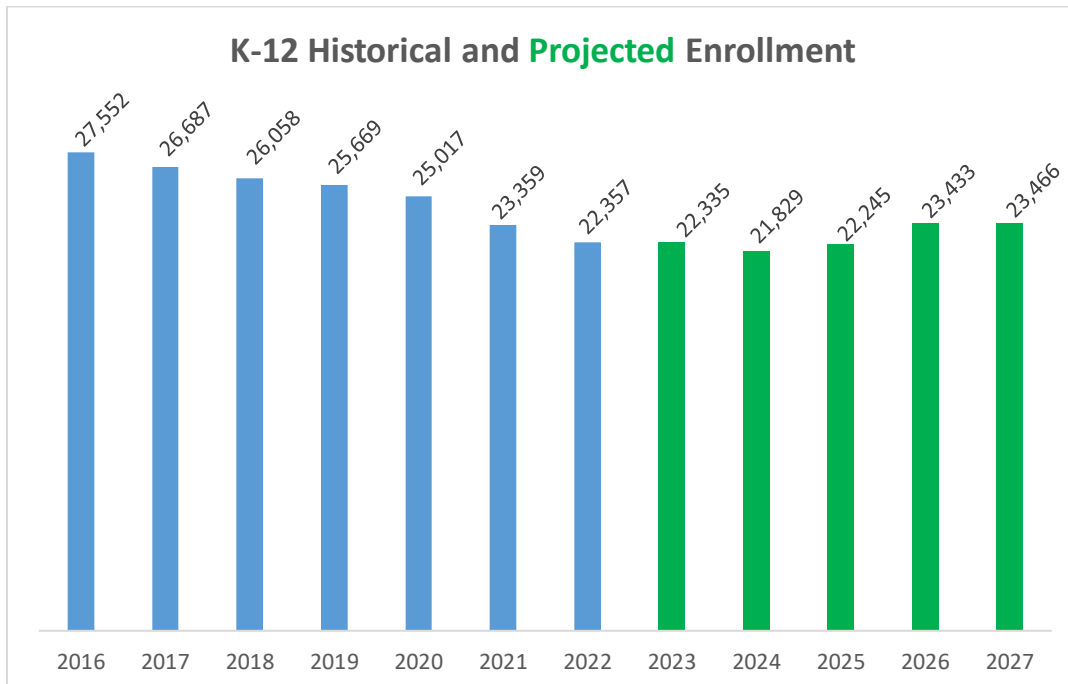
<sup>8</sup> Source: NY State Ed. Dept. Enrollment Data and 18-19 RCSD Budget Book. This data includes Pre-K enrollment.

<sup>9</sup> Source: RCSR 2021-22 budget book.

<sup>10</sup> Source: New York State Education Department Enrollment Data and RCSD Projected Enrollment Data.

<sup>11</sup> Source: 2019-2020 Comprehensive Annual Fiscal Report, p. 134 and p. 136, and the RCSD 22-23 Draft Budget Book, p. 22.

**Exhibit 1. Rochester City School District K-12 Enrollment History and Projections**



Source: CGCS, Using Data provided by the RCSD and New York State Education Department Online Data

**Exhibit 2. Rochester City School District FTE Staffing History**

Budgeted Positions By Full Time Equivalency - With Total Enrollment							
Position Type	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
	Actual	Actual	Actual	Actual	Actual	Adopted	Adopted
Teacher	3,432.35	3,661.99	3,758.35	3,444.59	3,078.14	3,108.43	3,146.22
Civil Service	1,478.87	1517.92	1,553.14	1,470.90	1454.05	1,440.78	1,421.27
Administrator	305.20	310.20	310.71	276.51	256.20	260.70	252.90
Teaching Assistants	286.00	299.00	329.40	300.6	267.00	273.00	283.00
Paraprofessional	505.00	576.30	557.60	479.60	474.00	459.00	453.87
Building Substitute Teachers	27.00	27.00	26.00	26.00	27.00	26.00	1.00
Employee Benefits	4.00	2.00	7.00	12.00	19.50	16.50	11.50
<b>Total</b>	<b>6,038.42</b>	<b>6,394.41</b>	<b>6,542.20</b>	<b>6,010.20</b>	<b>5,575.89</b>	<b>5,584.41</b>	<b>5,569.76</b>
Cash Capital Positions (not included above)	-	12.30	12.30	13.55	13.80	13.30	13.30
<b>Total with Cash Capital Positions</b>	<b>6,038.42</b>	<b>6,406.71</b>	<b>6,554.50</b>	<b>6,023.75</b>	<b>5,589.69</b>	<b>5,597.71</b>	<b>5,583.06</b>
<b>Total Enrollment, Including Pre-K</b>	<b>29,921</b>	<b>29,352</b>	<b>28,841</b>	<b>28,309</b>	<b>25,621</b>	<b>25,011</b>	

Source: CGCS, Using Data from the RCSD Annual Budget Books

The Rochester City School District Board of Education governs the district and is responsible for policymaking and oversight. The legal status of the Board of Education is that of a corporate body established under the laws of New York State. The board is a seven-member board elected by district residents. Each member serves for four years. The terms of office of board members do not all expire in the same year. Board members are responsible for school

district management and policymaking.<sup>12</sup> In addition, the board appoints the Superintendent of Schools, who is the chief executive officer responsible for the efficient and effective operation of the school system and its resources.

The RCSD Mission reads: *Foster students' individual talents and abilities in a nurturing environment of equity*, and the RCSD Vision reads: *Ensure all students equitable access to a high-quality education and graduate each student as a productive member of society*.<sup>13</sup>

The RCSD adopted appropriations (expense) total funds budget for FY2023 was \$983.6 million.<sup>14</sup> RCSD revenue was funded through a combination of general fund state aid (69.9 percent of total revenue), special aid fund revenue (12.6 percent of total revenue), City of Rochester (12.1 percent of total revenue), food service revenue (2.4 percent of total revenue), general fund local sources (1.6 percent of total revenue), appropriated fund balance (1.0 percent of total revenue), and general fund federal aid (0.4 percent of total revenue).<sup>15</sup>

Exhibit 3 below displays the current organizational structure of the Office of the Superintendent and the five direct reports to the superintendent.<sup>16</sup>

<sup>12</sup> Source:

<https://www.rcsdk12.org/cms/lib/NY01001156/Centricity/ModuleInstance/69473/2100%20School%20Board%20Legal%20Status%20CLEAN%20COPY%202-17-2022.pdf>.

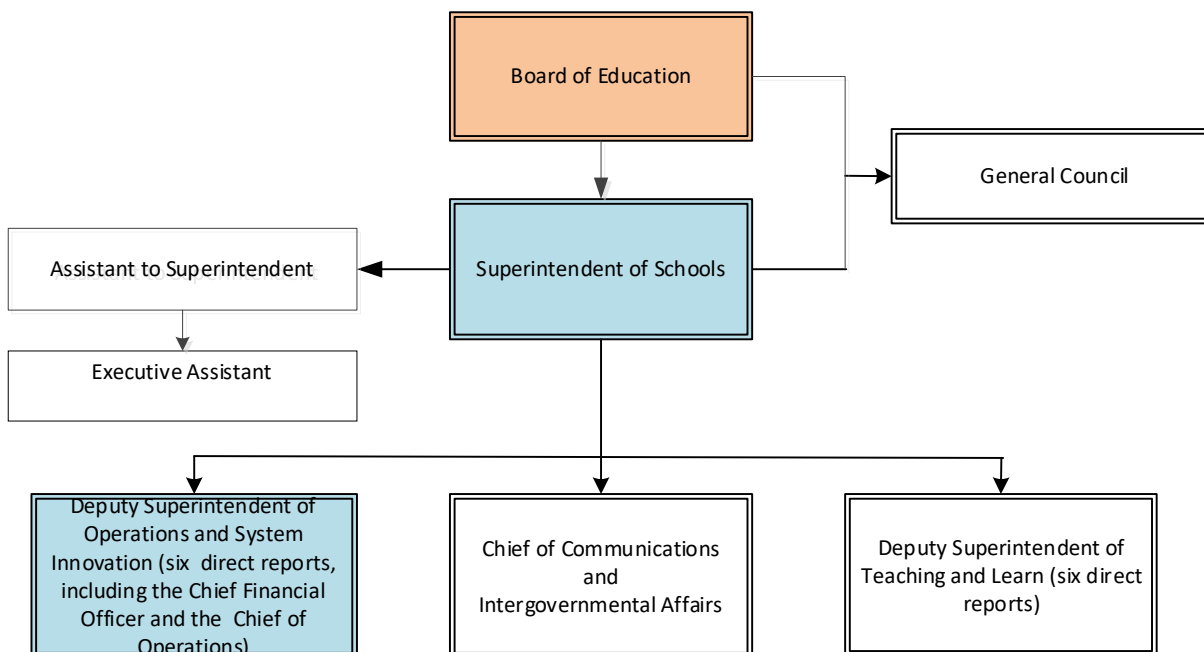
<sup>13</sup> Source: <https://www.rcsdk12.org/domain/8>.

<sup>14</sup> Source: <https://www.rcsdk12.org/cms/lib/NY01001156/Centricity/Domain/92/Proposed%20Budget%202022-23%206.9.22%20v4.pdf>, p.3.

<sup>15</sup> Source: <https://www.rcsdk12.org/cms/lib/NY01001156/Centricity/Domain/92/Proposed%20Budget%202022-23%206.9.22%20v4.pdf>, p.4.

<sup>16</sup> The General Counsel is a shared resource with the Board of Education and the Superintendent.

**Exhibit 3. Office of the Superintendent Organizational Chart**

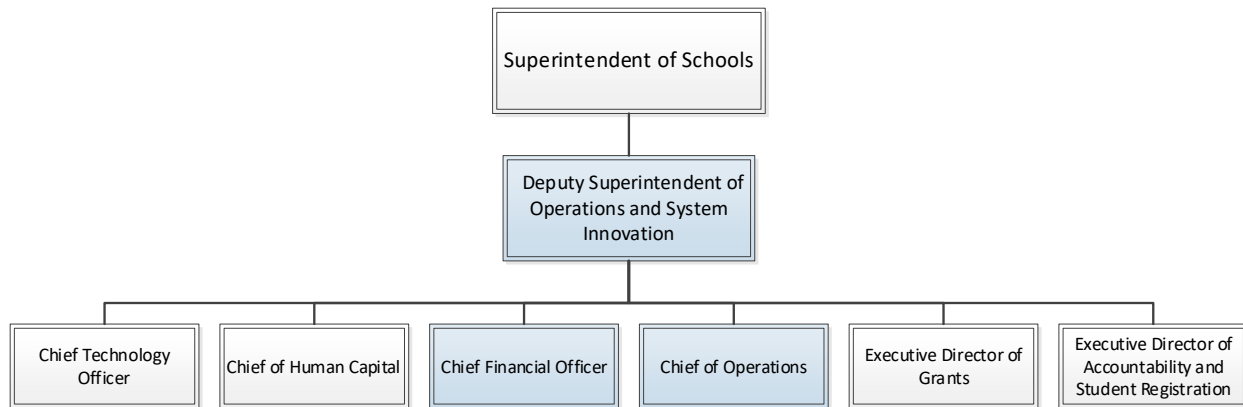


Source: CGCS, Using Data Provided by the Rochester City School District

**Deputy Superintendent of Operations and System Innovation**

The four functions the team was asked to review, Facilities, Finance, Procurement (which reports to Finance), and Transportation, organizationally are under the auspices of the Deputy Superintendent of Operations and System Innovation (DSOSI). The Chief Financial Officer (CFO) was a direct report to the DSOSI. In contrast, the Director of Facilities and the Director of Transportation were direct reports to the Chief of Operations (COO), who is also a direct report to the DSOSI. The DSOSI also oversees the areas and departments of Information Management and Technology, Human Capital, Office of Grants, and Office of Accountability and School Registration. The DSOSI, the CFO, and the COO are members of the superintendent’s executive cabinet. Exhibit 4 below displays the current organizational structure of the Office of the Deputy Superintendent of Operations and System Innovation.

**Exhibit 4. Office of the Deputy Superintendent of Operations and System Innovation  
Organizational Chart**



Source: CGCS, Using Data Provided by the Rochester City School District

**Department Overviews**

**Facilities:** The facilities department oversees the maintenance of district-owned buildings and grounds and the daily cleaning and custodial services for 49 school buildings, the central office, a service center, and two leased buildings. The department manages approximately 6.8 million square feet of space in 51 locations on 366 acres of land throughout the district.<sup>17</sup> The department also manages utility usage and executes rental agreements. In addition, the facilities department strives to optimize space utilization to efficiently serve RCSD students by implementing the District’s Facility Modernization Program (FMP) and a separate Capital Improvement Program (CIP).

**Finance:** The finance department oversees the development and compliance with appropriate policies, regulations, procedures, and applicable laws to safeguard district resources and guide financial transactions performed by the district, both internally and externally. The finance department’s goal is to utilize, safeguard, and protect the district’s resources while striving to move forward with the equitable distribution of funds to accomplish the district’s vision and mission with fiscal oversight. The department is responsible for the following functions: accounting, accounts payable, budget and revenue, financial management and grants, payroll, Medicaid reimbursement, and procurement. In addition, financial support is provided in planning, developing, and implementing strategies for immediate and long-range financial management.

**Procurement/Purchasing:** The goal of the purchasing department is to obtain the best value for goods and services for the students, teachers, administration, and district staff. The

<sup>17</sup> Source: RCSD Department of Facilities - *Facilities Services Handbook*, Revised June 2022, p.8.

department strives to obtain goods and services of the right quality, in the right quantity, at the right price, from the right source, with delivery at the right time. In doing so, the department contributes to the success of the educational process. The department issues over 5,500 purchase orders yearly valued at more than \$170,000,000.

**Transportation:** The goal of the transportation department is to positively impact student achievement by ensuring that RCSD’s 25,800<sup>18</sup> transported students have a safe and reliable daily transportation experience. The RCSD Board of Education established shorter transportation eligibility distances than the state-required minimums, which were allowable, and partially funded by the state. However, the district’s school choice program allows RCSD students to attend district schools other than the student’s local school or to attend selected schools outside the district boundaries (Urban-Suburban program), which challenges routing efficiency. Additionally, RCSD must transport students residing within the RCSD attendance area but attend private, charter, and parochial schools within RCSD’s attendance boundaries. Exhibit 5 below provides relevant staffing and department budget information for the four (4) departments under review.<sup>19</sup>

**Exhibit 5. Staffing<sup>20</sup> and Budget Data for Facilities, Office of Finance and Transportation**

Department	FTE Adopted 2021-2022	FTE Adopted 2022-2023	Adopted 2021- 2022 Budget	Adopted 2022- 2023 Budget	Increase (Decrease)
Facilities	94	86	\$ 20,187,892	\$ 19,542,048	\$ (645,844.00)
Finance (includes Procurement)	60	62	\$ 5,682,189	\$ 6,038,438	\$ 356,249.00
(Procurement)	7	7	\$ 573,858	\$ 611,355	\$ 37,497.00
Transportation	136.63	126.63	\$ 77,543,129	\$ 78,627,365	\$ 1,084,236.00

Source: CGCS, Using Data Provided by the Rochester City School District

<sup>18</sup> 2021-2022 school year.

<sup>19</sup> Source: RCSD adopted 2022-23 budget.

<sup>20</sup> School-site custodial staff are reported as school site employees, not as facilities department employees.

## Findings

The Council's Strategic Support Team findings are organized into four general areas: Commendations, Leadership and Management, Organization, and Operations. These findings are followed by a set of related recommendations for the district.<sup>21</sup>

### Commendations

- The grants department provides an online dashboard that explains and illustrates actual vs. planned grant expenditures. Additionally, the practices of the fiscal management of grants, including the grant feasibility analysis process, the use of a logic model to identify needs, and monthly projections reviewed with appropriate stakeholders, is exemplary.
- The bus garage the team visited was well organized and notably clean.
- District staff fully utilized the requisition approval/review workflow routing feature of the purchasing department's electronic requisitions system.
- The district has made significant investments to improve student and staff safety and security and currently has a three-year security initiative to enhance safety and security at district sites.
- The team found the vehicle maintenance facilities and parts rooms well organized and exceptionally clean. Exhibit 6 below highlights this commendation.

#### **Exhibit 6. Bus Garage and Facilities Part Room**



Source: CGCS Review Team

<sup>21</sup> 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 maintenance and custodial teams supported maintenance/operations leadership regardless of any hardships they were experiencing.
- The purchasing and human capital benefits teams have been actively engaged in designing and testing the functionalities of the new ERP software project.
- Without exception, all interviewees who interacted with the purchasing section for services paid the highest compliment to the professionalism and service-minded attitude of the purchasing staff.
- Building history was well documented. In addition, the team was provided with comprehensive information regarding district facilities. Exhibit 7 below showcases several school buildings the students and the RUSD community should be proud of.

**Exhibit 7. Well Maintained School Buildings**



Sources: CGCS Review Team

## Leadership and Management

- The constant churning in the district’s top-level leadership and managerial levels has created leadership instability and the resulting inability to move the district forward. As a result –
  - The lack of a clearly established and maintained set of cohesive directions contributed to many of the conditions described in these findings;
  - Absent solid and consistent leadership, the team found low morale among the staff who were hunkered down and trying to stay under the radar or have left or plan to leave the district due to frustration. In addition --
    - At least one reviewed department held no employee recognition or employee appreciation events;
    - Some employees felt they were “expendable commodities,” and another employee expressed, “It is difficult to be a high-functioning employee [here];”
    - The term “hostile work environment” was mentioned in multiple interviews;
    - Workspace provided to staff working at the central office was limited; and
    - Unions were not always viewed as “labor partners.” According to some interviewed, the union is running the district, not the superintendent and the superintendent’s cabinet.
- There was little evidence of an over-arching strategic vision, mission, goals, and objectives that permeated down to and embraced by staff to move the district forward. As a result --
  - Staff interviewed could not articulate a clear mission, vision, and goals to rally behind. Goals were on paper but not actualized in practice;
  - Across multiple interviews and departments, *Student Achievement* was not mentioned by staff; and
  - Interviewees could not articulate the goals or priorities of the administration or their department, nor how goals were linked to positive student outcomes.
- Knowledge sharing and effective communication, both internal and external, were not proactively practiced and ingrained into the district’s culture. To illustrate --

- The team was told that the dissemination of information, both up and down and side to side within and between departments, was not recognized or practiced as a high priority among teams;
  - Regularly scheduled staff meetings did not occur within each work unit as staff reported they did not have meetings within their department, much less with other departments;
  - Departments operated in “siloes environments” and “information islands” that were generally resistant to engaging with other offices. The team was told there was little departmental collaboration and that each department “looks out for itself;”
  - Department offices were not informed (or timely informed) of changes to policy or law that impacted the critical elements of job functions (e.g., changes in IRS withholding);
  - Key staff said they were not notified beforehand of the CGCS review and its purpose. Several employees shared that they were told of their CGCS interview shortly before the interview was scheduled to begin;
  - Some staff shared they heard or read about district changes on local or social media before officially hearing about these changes from the district;<sup>22</sup> and
  - There is no apparent proactive interaction between the city and the district to resolve issues, e.g., Facilities Master Plan (FMP), Capital Improvement Program (CIP), and vendors, to develop a level of collaboration for mutual benefit.
- No staff person interviewed by the team identified an executive sponsor or an overall program manager for the district’s new ERP<sup>23</sup> software transition and implementation project. This lack of leadership has resulted in de facto leadership falling on the district’s Chief Information Officer. As a result of this vacuum in critical communications and leadership --
    - Specific departments have jeopardized the project due to their lack of commitment and dedication to the project. To illustrate --
      - Participation from key executive leadership at ERP project meetings was sporadic at best;
      - Key personnel and subject matter experts were often not at the table when changes were

<sup>22</sup> A similar finding from school administrators was identified in a previous review.

<sup>23</sup> A Enterprise Resource Planning (ERP) system manages and integrates distinct software modules such as finance, budget, procurement, HR, and materials management. When information is updated in one module, data is sent to a central database, which shares the appropriate information with other modules.

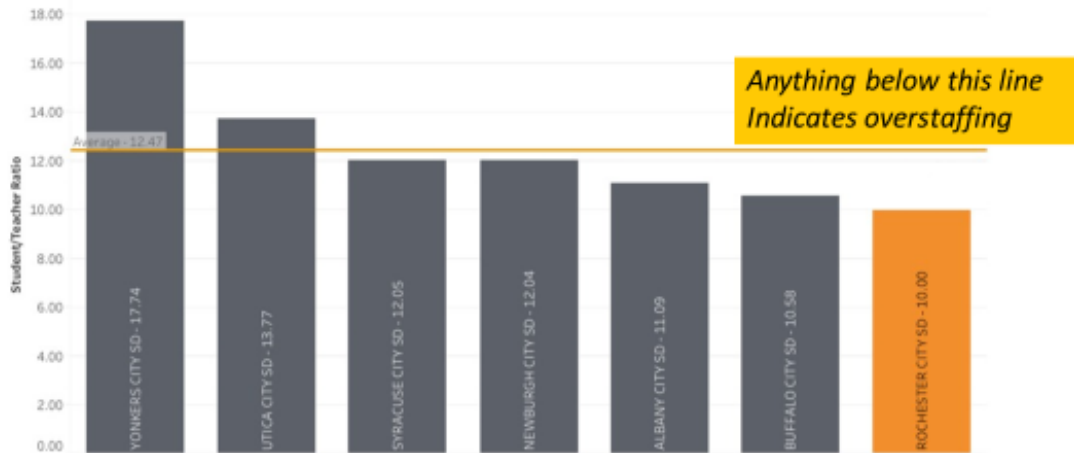
being discussed or during ERP transition planning sessions;

- The potential to add significant cost increases and cost overruns due to delays was real;
  - The district faces significant risk, and the lack of full functionality as the ERP “go live” date continues to move; and
  - There was confusion among those interviewees who have been active on the ERP implementation team (e.g., all reported that there had been no process mapping performed or directed by the implementation leadership. The team was told, “If it happened, we didn’t know (about) it.”
- The team found little evidence of proactive succession planning, capacity building, or cross-training in critical functions to ensure continuity due to absence, leave, retirement, promotion, or resignation of critical department staff.
  - Departments lacked strategic direction with goals, objectives, and priorities that key performance indicators (KPI) can measure to increase effectiveness and achieve greater efficiencies. Only a couple of interviewed departments indicated that they had clear and frequently measured department KPIs. In those cases, the interviewees indicated that management above the department level appeared disinterested in tracking department KPIs.
  - Departments underutilized basic management tools to take corrective action to move the department forward. For example --
    - Department-identified initiatives, business-case justifications with benchmarks, performance measures, accountabilities, or the use of industry analytics and metrics for department initiatives were not standard practice;
    - Actionable plans with roadmaps on how to implement, measure, and report on the performance of priorities were generally missing;
    - The district has not recently or consistently participated in the CGCS KPI project; and
    - Data-driven strategies with metrics were not used to make informed decisions.
  - The team was told that district staff had developed an action plan to manage its declining enrollment. The plan addressed empty K-6 classroom seats, low-enrollment schools, low class sizes vs. contracted class size limits, and “rightsizing” staffing and facilities to avoid the cost of maintaining under-utilized buildings. Unfortunately, the plan was not approved. Exhibit 8 below illustrates the overstaffed/under-enrolled phenomena the district faces.

### Exhibit 8. Students per Teacher Comparisons



# 2020 Student per Teacher FTE Comparison



Source: Rochester City Public Schools

- During interviews, multiple staffing concerns were identified. For example --
  - Although the team discovered strong leadership potential lower in the organization, currently, some departments do not have the right person with the appropriate skill sets and experience in the right positions at the senior levels needed to move the department forward;
  - Managers and supervisors often lacked the skill sets, vision, and attitude to make much-needed changes in processes and practices;
  - There was a high turnover rate among veteran employees, and no bench or recruitment plan in place to backfill/replace critical staff; and
  - The loss of critical institutional knowledge and history cannot be easily recovered.
- There was no plan to perform formal surveys to gauge customer satisfaction or climate indicators with services provided and to identify areas of concern and opportunities for improvement.

- The team identified or was told of risk and liability weaknesses, a possible lack of due diligence, and other vulnerabilities that could place the district at unnecessary risk. Specifically --
  - Although the Office of Human Capital has assumed *some* responsibility for risk, the district does not follow the best practice of having an office or department dedicated to risk management and mitigation;
  - It was unclear if there was a formalized process in place to ensure 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;
  - The team was also told that there was inconsistent or no face-to-face onboarding process for new employees (e.g., “An envelope with forms to complete was left on a new employee’s desk after a couple of weeks”);
  - The team was told that the district does not require or conduct a routine physical inventory of assets;
  - The team identified multiple ADA<sup>24</sup> accessibility issues that were observed during site visits;
  - Most job descriptions reviewed across departments were generally outdated and did not reflect current responsibilities or the use of existing technologies;
  - The team observed numerous student-occupied areas with exposed low and high voltage equipment within reach of students;
  - During onsite field observations, boiler rooms were used for storage, and multiple fire and safety concerns were identified. It was apparent that site leaders and other supervisors were not carefully monitoring these types of hazards;
  - The team observed large areas of peeling paint in equipment rooms that likely contained lead materials;
  - During site visits, the team found bus parking lots lacking security in that fencing was limited and surveillance cameras missing;

<sup>24</sup> Americans with Disabilities Act.

- The team recognized resistance to transporting non-disabled students on the same bus with their disabled peers to provide the student with a Free Appropriate Public Education as required by the Individuals with Disabilities Education Act;<sup>25</sup> and
- An essential best practice, individual position control,<sup>26</sup> was not currently in place at RCSD. The lack of a position control system in and of itself puts the district at risk, as positions could be added without proper authorizations or approved funding.
- Staff from multiple departments shared that it takes months to approve contracts and that the Office of the General Counsel seems to be the common “choke point” in the contract approval process. As a result --
  - The time available to execute contracts and CIP was shortened; and
  - The potential for delaying expenditures of key federal grant funds beyond the allowed time is an unnecessary risk and challenge.
- Deficiencies in training and staff development were identified by or shared with the team. For example --
  - The team found little evidence that a coordinated districtwide professional development plan for all employees was in place;
  - Departments lacked formal internal coaching programs to develop their employees’ leadership, management, or technical competencies;
  - Not all departments reviewed had an internal training component within their organization;
  - Employees new to their position were not always trained (or trained appropriately) to be successful in the critical elements of the job; and
  - As systems were modernized or rolled out, adequate training on the new programs was

<sup>25</sup> Pursuant to the U.S. Individuals with Disabilities Education Act, the least restrictive environment [LRE] is a principle that governs the education of students with disabilities and other special needs. LRE means that a student who has a disability should have the opportunity to be educated with non-disabled peers to the greatest extent appropriate. These students should have access to the general education curriculum, extracurricular activities, or any other program that non-disabled peers would be able to access, including transportation.

<sup>26</sup> A position control system integrates the Human Resources Department for HR information, the Budget Department for budget development, the Payroll Department for payroll-related data, and the Finance Department for salary and benefit projections.

limited.

- Multiple departments lacked written processes and procedures, documented workflows, standard operating procedures (SOPs), and the leveraging of current technologies needed to create “an effective and efficient operation with quality control standards.” As a result --
  - Operating procedures, systems, and processes were inconsistent, unnecessarily transactional, complicated, redundant, and manually intensive; and
  - Staffing in some departments appeared excessive due to the overreliance on manual processes.
- Many staff interviewed shared that they had not received performance evaluations in several years. Additionally, it was unclear whether all employee performance evaluations were linked to the responsibilities described in the job description.
- Recruitment and timely onboarding of new employees continues to challenge the district. Although strides have been made, the district continues to lose top-tier candidates to other districts and agencies, both public and private, due to RCSD’s slow onboarding practices. For example --
  - Onboarding for skilled trades has taken up to eight months to complete, compromising the district’s ability to fill vacancies.
- In addition to documents requested but not provided before the team’s arrival, many other documents requested during the onsite visit were also not provided.

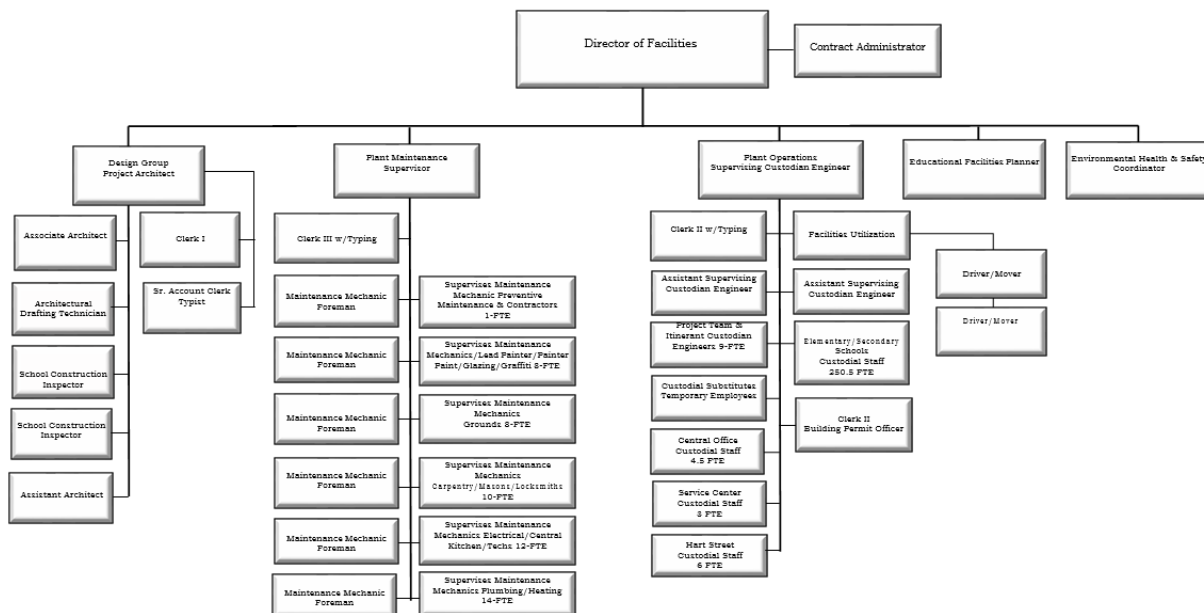
## **Organization**

- The organizational charts provided to the team (displayed below in Exhibits 9, 10, 11, and 12) varied in style and consistency, making it difficult to navigate current reporting relationships, scopes of responsibility, and distinguish between line vs. staff functions.<sup>27</sup>

<sup>27</sup> A line function or position has authority and responsibility for achieving the major goals of the organization. The primary purpose of a staff function or position is to provide specialized expertise and assistance to line positions.

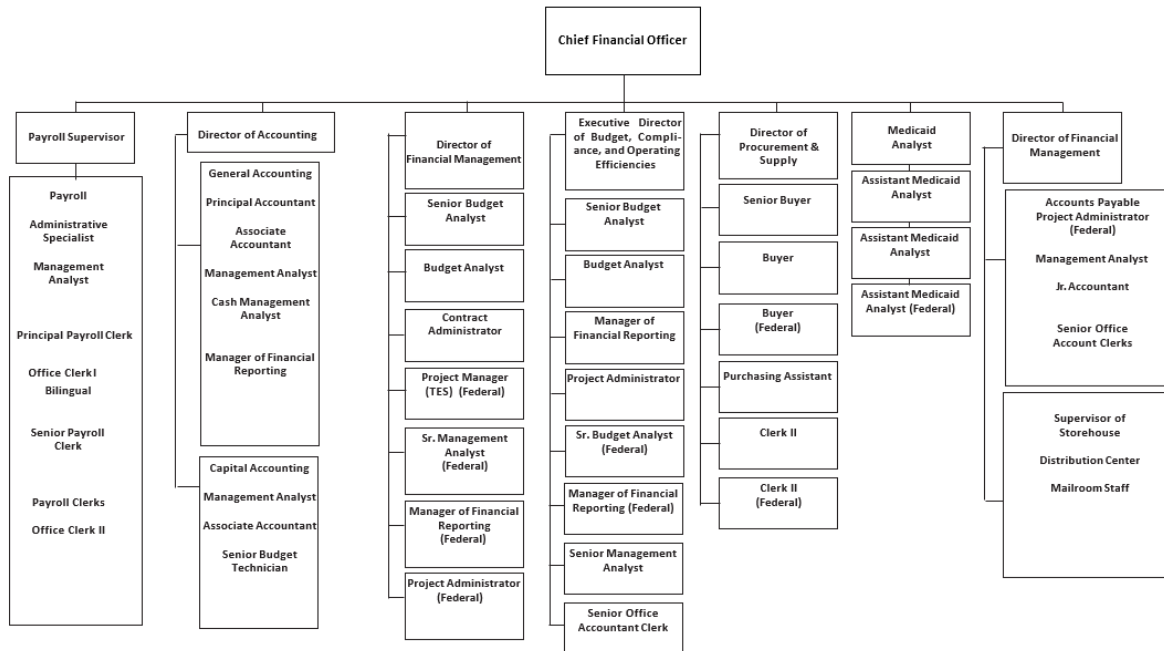


## Exhibit 9. Department of Facilities Organizational Chart



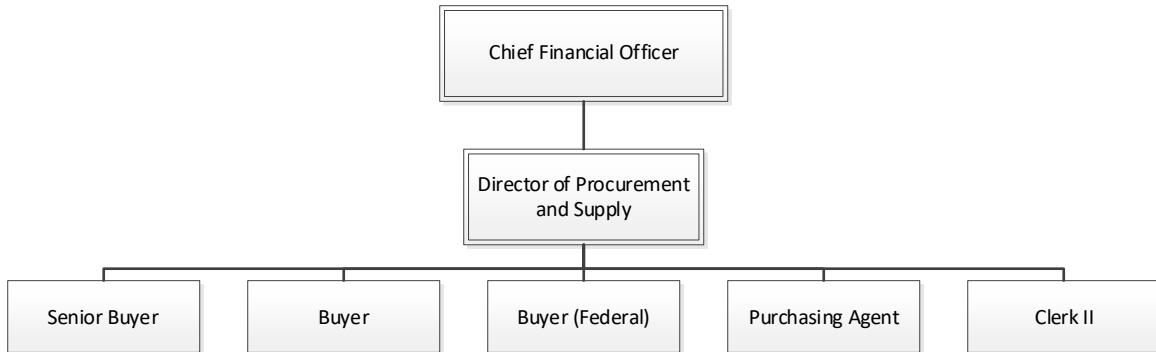
Source: Rochester City School District

## Exhibit 10. Department of Finance Organizational Chart



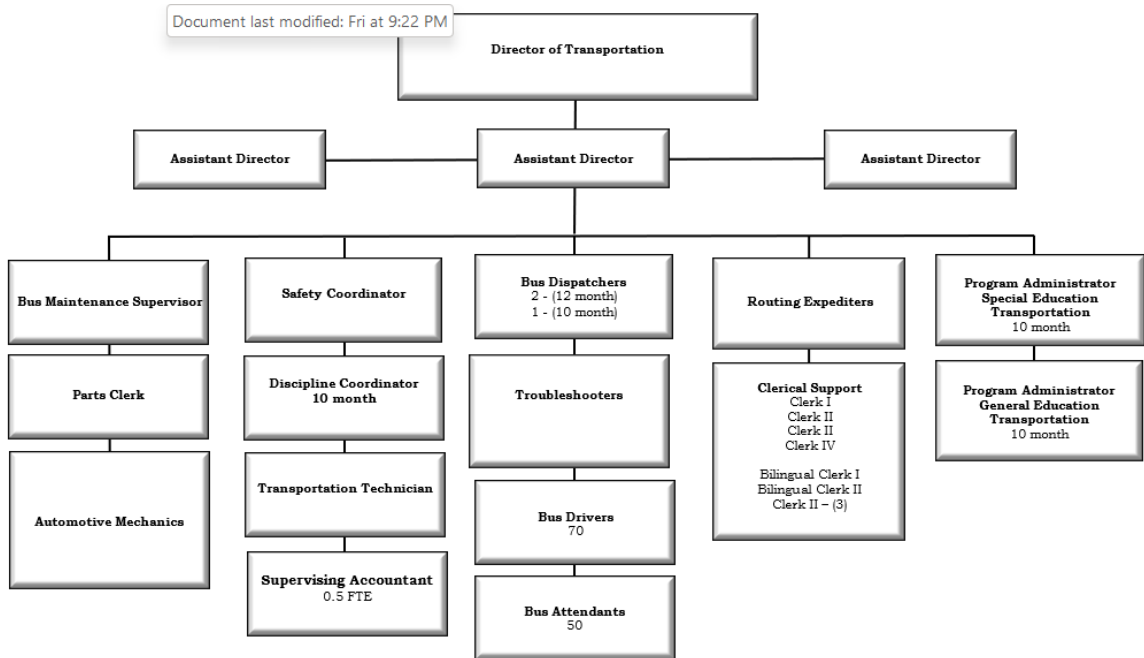
Source: Rochester City School District

**Exhibit 11. Office of Procurement/Purchasing Organizational Chart**



Source: CGCS, Using Data Provided by the Rochester City School District

**Exhibit 12. Department of Transportation Organizational Chart**



Source: Rochester City School District

- The hierarchal placement of the finance department within the district’s organization was undervalued and misaligned compared to current best practices. For example --
  - The department’s current organizational placement did not recognize that the CFO and the finance functions perform an enterprise-wide strategic role that should report to the Office of the Superintendent; and

- Relegating the department to a third-tier position in the organizational structure marginalizes the department's ability to advance organizational development and effectiveness.
- The district lacked a critical enterprise-wide risk management function, which is also a best practice.
- It was not apparent that the district reviewed its organizational structure to determine if there were appropriate spans of control and appropriate layering within departments. For example --
  - The transportation department had three (3) assistant director positions on the organizational chart provided to the team. Two (2) of the three (3) assistant directors were individual contributors with no apparent management responsibilities assigned.
- The team identified misalignments and reporting relationships within current department organizational structures, including --
  - Health Service (nursing) currently reporting to the Chief of Operations;
  - Payroll and Medicaid reimbursement were direct reports to the Chief Financial Officer;
  - Supervisor of Storehouse, an operations function, currently reports to the Director of Financial Management;
  - Accounts payable currently report to the Director of Financial Management; and
  - An Educational Facilities Planner and an Environmental Health and Safety Coordinator were direct reports to the Director of Facilities.
- Facilities lacked a dedicated in-person training function and a maintenance schedular/dispatcher position.
- The lack of a position control system made it difficult to crosswalk positions with the organizational charts provided.
- The team saw no evidence that department workflows were examined and if staff or positions could be repurposed to achieve operational efficiencies and effectiveness.

## Operations

- The team noted the following areas of concern specific to the Facilities Department --
  - Exhibit 13 below displays the scope of the department’s responsibilities for maintaining the district’s physical assets;

### **Exhibit 13. Facilities Department’s Scope of Responsibilities**

<b>Rochester City School District</b>	
Number of Sites	51
Total Number of Acres	366
Total Number of Square Feet	6,881,636
Oldest Building (yr placed in service)	1903
Newest Building (yr placed in service)	1998
Average Age of All Buildings (years)	75
Total Enrollment 2021-2022 (including Pre-k)	25,011
Total Capacity	36,524
Total Number of Classrooms	Unknown
Total Number of Unused Classrooms	Unknown

Source: CGCS, using Data Provided by the Rochester City School District

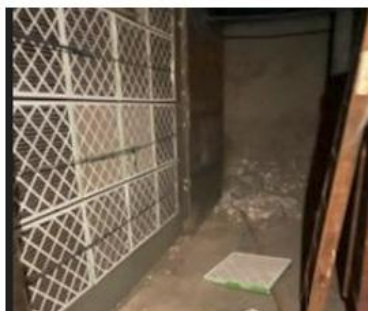
- The district’s inability to “rightsize” consistent with enrollment changes has created a notable underutilization of the district’s school buildings and classrooms;
- Maintaining infrastructure while reducing staff due to lower student enrollment was stressing the productivity and budget of the district, e.g., bloated capital capacity but understaffed to maintain current facilities appropriately;
- Cost-benefit analysis and return on investment studies were not required on building improvements or building usage resulting in buildings being modernized and repaired vs. when they should be closed or demolished;
- As a result of staff reductions and the closing of the preventive maintenance (PM) activities, functional responsibilities were transferred from skilled trades personnel to custodians to the detriment of facility conditions. For example --
  - The custodial staff was now required to perform PM activities on mechanical, electrical, and plumbing systems without the appropriate experience and training to perform these PM functions. As a result --

- Preventive maintenance was not being performed to industry standards causing the district's facilities department to operate in a "triage" mode;
- Facilities staff had limited or no input into facilities modernization projects (FMP). As a result --
  - Maintenance was not invited to perform a comprehensive punch list of the Phase 2 FMP project resulting in an additional impact on the maintenance team's corrective measures;
  - The FMP team does not successfully engage with the CIP teams;
  - The FMP team failed to identify, incorporate, or remediate failing systems;
- The FMP capital improvement team does not include design and development components, resulting in infrastructure not being improved or replaced;
- Conversely, the CIP team was not allowed to make improvements on modernized buildings for up to 10 years unless there was a catastrophic failure;
- It was not clear to the team the limitation of the district's capital improvement borrowing capacity due to the required regulation for including state aid offsetting 98 percent of capital costs on the balance sheet when small cities are not required to do so;
- The team was told that custodial staff and skilled trades mechanics had the same starting civil service salary, which was inconsistent with national industry labor standards. If accurate, this practice severely limits RCSD's ability to recruit and hire skilled tradespersons;
- All open maintenance work orders are closed at the end of every school year, causing staff to resubmit the defect. This practice allows for no historical accounting of latent defects or unresolved work orders that can be tracked to a conclusion;
- The team observed dirty and unrepaired conditions at some schools, indicating low custodial service and a failure to generate work orders at every school; Exhibit 14 below displays examples found during site visits.

### **Exhibit 14. Facilities in Need of Repair or Cleaning**



Open electrical junction box



Filters falling off frame creating trip hazard



Peeling paint likely containing lead – unsafe storage



Unsafe storage in mechanical room



Exposed utilities (ceiling) in student occupied areas



Fall hazard – opened pit in floor

Source: CGCS Review Team

- The district restricts many capital improvement projects to the summer break creating an unnecessary constraint and potentially adding cost despite having available space at the facility where CIP work will take place. Thus, the district unnecessarily relocated students and staff to alternative facilities. Exhibit 15 below presents the summer 2022 construction schedule;

## Exhibit 15. RCSD Summer 2022 Construction Schedule

	PK-6 CR	7-12 CR	Operating Capacity	Avail. for Summer School	Rec. for Summer School	Preliminary summer school locations	AC	Pool	21-22 CIP or Other Work	23-24 FMP	Moving this summer	Comments
<b>Elementary School Buildings</b>												
2 Clara Barton School	27		450									
3 Nathaniel Rochester Community School	22	12	740					X	X			Rec Center project only
4 George Mather Forbes School	21	8	550			09+110+70+4		X				Summer School 200+110+70+110
5 John Williams School	25	8	690			250		X				
7 Virgil S. Grissom School	19		620			71		X				
8 Roberto Clemente School	24	7	630					X				Playground, sitework tile in entrances
9 Dr. Martin Luther King School	26		610					X	X			
10 Dr. Walter Cooper Academy	21		420			130+130+150		X				Summer School 150+130+150
12 Anna Murray-Douglass School	38	7	970			130+700		X				
13 Children's School of Rochester	21		460									
16 John Walton Spencer School	30		530			150						
17 Enrico Fermi School	26	10	800									
19 Dr. Charles T. Lundford School	20	7	570			150+150		X				A/C minor renovations, (Summer program in gym only)
20 Henry Lomb School	20		410									
22 A. Lincoln School	20		710					X				NORTHSTAR (Hart Street)
23 Francis Parker School	16		380									
28 Henry Hudson School	26	8	700			150+150		X				
29 Adlai C. Stevenson School	28	3	350					X				
33 Audubon School	60		1290									Canopy, DDC conversion
34 Dr. Louis A. Cerulli School	24		540									
35 Pinnacle School	23		530									
39 Andrew J. Townson School	31		690									
42 Abelard Reynolds School	25		550									
43 All City												
44 Formerly Lincoln Park School (vacant)	20		400									
45 Mary McLeod Bethune School	27	5	650			150+50		X				
46 Charles Carroll School	16		270									
50 Helen Barrett Montgomery School	25	8	740					X				
52 Frank Power Dow School	17		390									
54 Flower City School	23		400					X				
58 World of Inquiry (PK-6)	14		330					X				
106 RISE Community School	31		650					X				
ECBC 107-111 N. Clinton Ave.	12		218					X				
Dr. Freddie Thomas Campus (Montessori & 25)	41	5	950					X				Boiler repl, gym partition, minor renov., dock equip. VACANT
Joseph Wilson Found. Campus (WFA)	17	16	750					X				VAV boxes, auditorium seating, minor classroom upgrades
			20270									
<b>Secondary School Buildings</b>												
Charlotte High School	2	37	880					X				Turf field, pressbox, coors, window balances, NE moves in
NE and NW Prep. HS at Douglass Campus	35		1140					X				NE moves out
James Monroe High School	53		1300			150+200		X				
East High School	1	76	1800					X				Boiler replacement - No Hot Water in the building!!
Edison Educational Campus	99		1950			09+200+80+2		X				Summer School 300+200+80+250
Franklin Educational Campus (Upper and Lower)	68		2380			sports 135/7		X				Sidewalk, roofing on portico, masonry parapets, security camera
Thomas Jefferson High School (RIA)	53	23	1340					X				
John Warzner High School (vacant)	27		1210					X				Asbestos floor removal
School of the Arts	43		1020			350+40+80		X				
School Without Walls Comm Academy	15		350			40+150		X				
58 World of Inquiry (7-12)	28		640			240		X				
Joseph Wilson Comm Academy	52		1040					X				Attic work, roofing
Joseph Wilson Found. Campus (WFA)	14		290			135 sports		X	X			VAV boxes, aud. Seating (Summer program), sports only gym and outdoor
			15,150									
			26,626 total									
<b>Other Buildings</b>												
15 Costar Office support location (Former #57)												
30 Hart Street		22	410			450+120		X				
Service Center												
Central Office												
<b>Key</b>												
Red = not available												
Yellow = Construction, summer sch. may be possible												
Green = building moving and on the go												
Available summer school location				28	12	17			12	-	-	Totals
Recommended summer school location												
Anticipated Summer School location and # of students												
<b>Notes:</b>												
1. This building will have construction, but it may be limited in scope or sufficiently isolated to allow a summer school program to occur at this location.												
2. Schools that appear under both elementary and secondary sections are only counted once in these totals.												

SUMMER 2022  
Update 5-3-22

Source: Rochester City School District

- There was a lack of local apprenticeships or intern programs for high school students, and with local community colleges and trade schools for adults to create needed pipelines for hard-to-fill (trades) positions;

- District facilities (below) were rented well below cost recovery values and market rental rates. Revenue received by the district was not specifically reinvested into PM programs or facility repairs. Additionally, the district did not utilize the rental module available in the facilities software the district uses. Exhibit 16 below lists the fee schedule for facilities rentals; and

**Exhibit 16. RCSD Facilities Rental Fee Schedule**

Facility Use		Personnel	
Facility Use	Cost Per Hour	Staff	Cost Per Hour
Auditorium	\$10.00	Custodian	\$24.00
Gymnasium	\$10.00	Sentry	\$15.00
Locker Rooms and Showers	\$10.00	Locker Room Attendant	\$15.00
Cafeteria	\$10.00	Stage Manager	\$20.00
Library	\$10.00	Stage Crew	\$7.00
Swimming Pool	\$15.00	Lifeguard*	To be determined based on contractual salary schedule
Classrooms	\$8.00	Other District staff, as required	To be determined based on contractual salary schedule
Commons Room	\$10.00	* A qualified person, as defined by the Board of Education, must always be on duty when persons are using the pools in the Rochester School system.	
Community Room	\$10.00		
Forum Room	\$10.00		
Multi-Purpose Room	\$10.00		
Dressing Room	\$8.00		
Other Facilities	To be determined		

Equipment	
Equipment	Cost Per Day
Public Address System	\$15.00
Audio Visual Equipment (i.e., TV, VCR, etc.)	\$15.00 per item
Stage Lighting	\$20.00
Piano	\$10.00
Table or Podium	\$5.00
Risers**	\$20.00
Scenery	\$10.00
Other Equipment	To be determined
** A minimum of two people are required to set up risers. Labor rate is \$20.00/per person/per hour.	

Source: CGCS, using Data Provided by Rochester City School District

- There was only one person per site assigned to enter maintenance work orders into the facilities management system. Since there was no backup, custodial staff must contact the central office maintenance staff to input work orders.
- The team also noted the following areas of concern specific to the Finance Department --

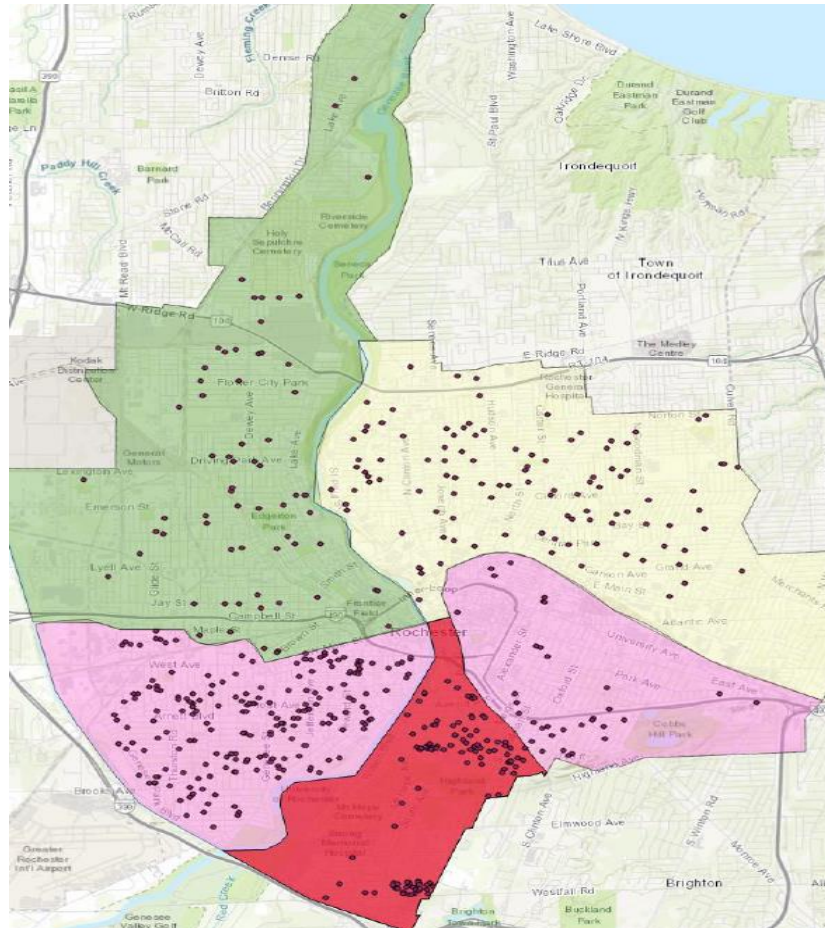


- Some existing labor contract language causes employee overpayments. Efforts to track, reconcile, and recover these overpayments were an intensive manual process. When asked, staff could not quantify a total dollar amount of what the costs of the overpayments were;
- In addition, considerable employee absences were reported two weeks after the applicable payroll period, which exacerbated manual payroll correction processing;
- Budget staff added positions to locations after the budget was approved without preparing a budget amendment to the board. Some budget department staff indicated that the only reason for budget amendments was for capital and grant programs, which was not consistent with industry best practices;
- Multiple line staff indicated they are uncomfortable when their questions to supervisors go unanswered, requiring the employee to make decisions on their own or seek answers via online resources that may be unreliable;
- Staff reported that the budget process lacks analytics review. No research or analysis was conducted during the most recent budget cycle or conversations with principals or other site administrators regarding changing needs or new initiatives. As a result --
  - Finance staff were blindly provided staffing allocations without a clear understanding of the genesis of the request;
  - Finance staff were unable to ensure an equitable distribution of resources;
  - Finance staff became frustrated and shared, “We just do what we are told;” “The budget process is a lot of work and churn but no real budget development;”
  - Staff with decades of experience in successful budget development were frustrated and looking for jobs outside of the district;
- Some staff with significant years of budget experience spent the majority of their time processing budget transfers of low dollar value and were not performing the duties described in their job descriptions and appropriate to their skills and expertise;
- Due to the district’s lack of position management/control and existing system redundancies, it can take up to one hour to complete one transaction for staffing a grant-funded position;

- The district is restarting its P-Card and E-payable programs. The team was told that previously there was a lack of accountability that resulted in the discontinuance of the P-Card and E-Payable programs;
- The team was told that the current budget was structurally imbalanced in that “The gimmicks used to “balance” the budget will be an immediate problem at the beginning of the next fiscal year;” and
- The 2023 fiscal year budget used an appropriated fund balance of \$10M to balance the budget. It was unclear if a plan was in place to eliminate the use of the appropriated fund balance and whether or not the \$10M was recurring or non-recurring.
- The team also noted the following areas of concern specific to Procurement/Purchasing --
  - The team heard that budget spending was cut off in February, causing disruptions to campuses and departments’ ability to order needed supplies and materials;
  - Although the district utilizes automated E-signatures for key documents (contracts), there was inadequate monitoring and control of signature cycle time; and
  - The district made excellent use of commodity-specific approval routing for requisitions; however, no backup/alternate approvers were identified for technology requisition approvals, resulting in unnecessary delays in approval during the absence of an approver.
- The team also noted the following areas of concern specific to the Transportation Department --
  - Under the current “very generous” transportation eligibility policies, operational and fiscal efficiencies were nearly unachievable. To illustrate --
    - Parent(s) of newly enrolled kindergarten - 6<sup>th</sup> grade (K-6) students can apply for any K-6 program at RCSD schools within their geographic zone (currently, there are three (3) elementary school zones) or can apply to one of five (5) citywide K-6 program schools. In either case, K-6 students that reside more than 1.5 miles from their assigned school were also eligible for RCSD school bus transportation;
    - K-6 students who move anywhere in the district and reside more than 1.5 miles from their assigned school are also eligible for RCSD school bus transportation. Exhibit 17 below illustrates the large number of students (represented as “dots”) transported from the green and yellow zones into a school in the red zone. The team was told that

students being transported from the green and yellow zones represented children who moved out of the red zone but continued to have transportation privileges;

**Exhibit 17. Example of Students Transported from the Green and Yellow Zones to a Red Zone School**



Source: Rochester City School District

- K-6 students that reside within the RCSD boundaries but DO NOT attend an RCSD school and live more than 1.5 miles from their school of attendance were also eligible for RCSD school bus transportation;
- Non-RCSD schools (e.g., charter, private, parochial) had various start and end dates (calendars) and differing bell schedules from one another and RCSD schools, which added another layer of complication to routing and cost efficiency. Exhibit 18 below illustrates that RCSD transports students to 162 non-RCSD school sites, compared to transporting students to only 52 RCSD school sites. In other words, by a factor of more

than 3:1, RCSD transports students into far more non-RCSD school sites than district sites;

**Exhibit 18. Students Transported by School Type**

<b>Program Type</b>	<b>Sites</b>	<b>Routes</b>	<b>Students</b>
<b>Non-RCSD Schools</b>			
Private/Parochial	31	36	716
Urban/Suburban	69	71	900
Charter	24	188	5,408
Agencies	38	109	418
Sub Total	162	404	7442
<b>RCSD Schools</b>			
Grand Total	214	1,164	25,765

Source: CGCS, Using data Provided by the Rochester City School District

- There appeared to be minimal use of the more efficient “corner” and “school site” bus stop locations, as the team was advised that 80 percent of all bus stops were home pickups and drop-offs;
- The team noted that working relationships between most contracted bus vendors and department leadership were, at best, “strained;”
- The district’s existing bus routing system was unable to meet the current needs of the department in that the route map does not cover the necessary geographic areas for many of the transported suburban/urban students;
- The department collected employee time through two methods, (1) facial recognition and (2) manual timecard reporting. The manual time reporting process was needed as a backup as the department experienced challenges ensuring all driver activities were successfully entered into the facial recognition database;
- There was no departmental strategic plan in place to ensure “first day of school” readiness that included definitive timelines that all impacted departments and the bus contractors could plan by; and
- All 5,100 RCSD *Students with Disabilities* (SWD) were provided home pickups when only 3,300 of these IEPs<sup>28</sup> required door-to-door service.

<sup>28</sup> Individualized Education Program

## Recommendations

The CGCS Strategic Support Team developed the following recommendations<sup>29</sup> to improve the Rochester City School District Operations strategic value to the district:

1. Develop comprehensive and definitive operational plans for each department, including goals, objectives, benchmarks, performance measures, accountabilities, and costs that support the RCSD Mission, Vision, and Core Values. Department plans should include timelines and process descriptions for at least the following activities --
  - a. Business plans aligned with the superintendent's and board's goals,
  - b. Yearly department initiatives,
  - c. Annual department forecasting, planning, and timelines,
  - d. Budget development,
  - e. The development of comprehensive policies and procedural guides (SOPs) so department employees know what to do and how to do it,
  - f. Training and professional development,
  - g. Annual performance evaluations and assessments linked to goals and job descriptions,
  - h. Defined performance measures, including KPIs<sup>30</sup> and industry standards for all primary functions of the departments, including manager and supervisor accountability for achieving these measures, and
  - i. An ongoing departmental process improvement program to encourage innovation and continuous improvement.
2. Create, with a sense of urgency, an inclusive stakeholder task force<sup>31</sup> to examine and develop

<sup>29</sup> Recommendations are not listed in any specific order or priority.

<sup>30</sup> CGCS KPI's are available for review. See: Attachment E (Finance), Attachment F (Maintenance and Operations), Attachment G (Procurement/Purchasing), and Attachment H (Transportation).

<sup>31</sup> The task force should include input from students, families, neighbors, other community members, selected officials, and school district staff.

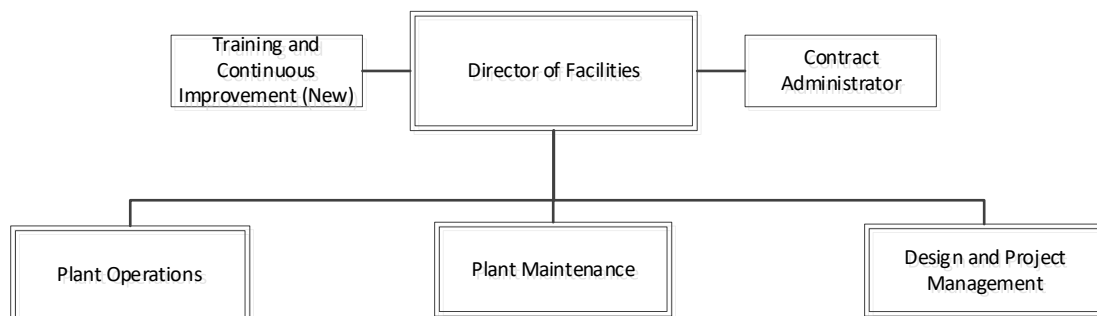
recommendations for at least the following asset management activities<sup>32</sup> --

- a. Developing an asset management plan with guiding principles that align with the district's strategic vision;
- b. Monitoring enrollment projections, attendance, enrollment trends, and conducting regular asset inventories that strategically measure the suitability of the district's real estate portfolio. These assessments need to be conducted publicly so that community stakeholders are not surprised by the findings or the recommendations, especially concerning school closings;
- c. Expanding the Facilities Master Plan to address the district's underutilized schools and incorporating the deferred maintenance backlog through a current Facilities Conditions Index. Considerations should include --
  - i. Determining whether current facilities are meeting educational needs and comply with regulations on matters of classroom size, ADA requirements, and all current building codes;
  - ii. Evaluating priorities that may include safety, sustainability, suitability for technology and educational innovation, community partnerships, and resource equity to ensure quality school options in every neighborhood;
  - iii. Determining the return on investment of repurposing, maintaining, or closing underutilized classrooms and buildings;
  - iv. Moving scarce resources from underutilized facilities into schools and classrooms where students' academic achievement needs to improve the most;
- d. Determining the current cost to the district to rent RCSD facilities for non-school-sponsored activities (e.g., scouts, neighborhood groups, clubs). Considerations should include --
  - i. All overhead costs to process rental applications, payroll reporting, and payroll processing,
  - ii. Climate control costs (heating/air conditioning),

<sup>32</sup> Source: *Reversing the Cycle of Deterioration in the Nation's Public School Buildings*, published by the Council of the Great City Schools, 2014.

- iii. Onsite Personnel (staff) costs to support the activity,
  - iv. The use of district equipment during the activity,
  - v. Reviewing and updating the fee schedule annually to ensure the district is made whole for all expenses; and
  - vi. Exploring the possibility of securing relief from the state borrowing regulation in the same manner that the small cities do.
3. Dedicate the needed involvement and participation of essential subject matter staff resources to the ERP activity, including utilizing temporary staffing additions required to meet project deadlines.
  4. Realign the Finance Department as a direct report to the Office of the Superintendent to reflect the office’s role, value, and best practice as an enterprise-wide strategic partner in the school district's management, leadership, and fiscal guardianship.
  5. Reorganize the organizational and administrative structures (shown below in Exhibits 19, 20, and 21) for the facilities, finance, and transportation departments.<sup>33</sup> This restructuring will assist in achieving greater efficiency, effectiveness, and positive customer service outcomes. Additionally, the departments will be able to sharpen their focus, improve internal and external communications, and promote clear lines of responsibility, authority, and accountability in meeting their strategic missions. Specifically --
    - a. Exhibit 19 below illustrates a potential high-level functional reorganization for the Facilities Department. Under this reorganization --

**Exhibit 19. Proposed Facilities Department Functional Reorganization**



Source: Council of the Great City Schools

<sup>33</sup> The team is recommending no changes be made to the current Procurement/Purchasing organizational structure.

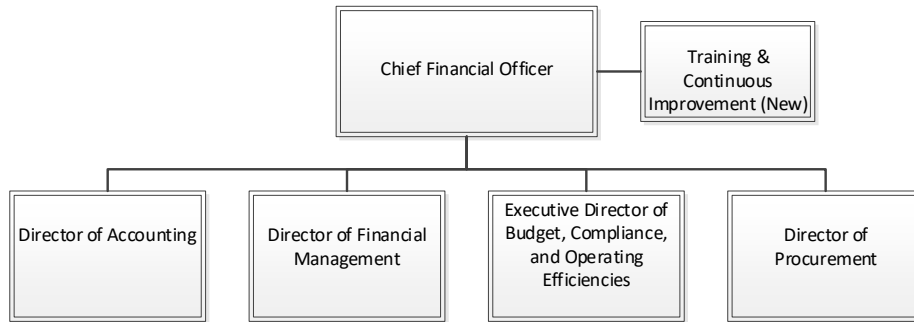
- i. The Director's span of control is simplified, permitting increased departmental oversight, metric monitoring, goal setting, employee accountability, and ownership of re-engineering the department to a preventive maintenance culture;
- ii. The Plant Operations function will be responsible and accountable for excellence in building and grounds cleanliness and safety; integrated pest management; developing appropriate staffing levels consistent with K-12 industry norms based on building age, building type, size, condition, number of students, and usage; implementing standardized operating procedures at all sites; requiring daily random quality assurance inspections and walk-throughs with written scores; and enforcing consistent standards to measure cleanliness and appropriate APPA<sup>34</sup> standards. The Environmental Health and Safety function is moved to the Plant Operations team;
- iii. The Plant Maintenance function will be responsible and accountable for an aggressive preventive maintenance program; the districtwide use of smart technology; the district's energy conservation program; oversight of safety and environmental issues such as lead in drinking water, indoor air quality, and peeling paint; the creation of a work prioritization and staffing formula; leveraging all available technology, including GPS, to monitor productivity; maintaining high-quality assurance and control standards; and the timely delivery of exceptional maintenance and repair services to schools, central office, and support locations. In support of these efforts, a new maintenance scheduler/dispatcher position should be created;
- iv. The former Design Group should be renamed *Design and Project Management*. This unit will be responsible and accountable for: aligning and integrating CIP (in-house) and FMP (outside-administered and directed) planning; long-range capital master planning and its continual updating; capital project completion; capital repairs; developing and frequently updating educational specifications and design guidelines; overseeing project management functions (revising the current School Construction Inspectors' job descriptions to a new Assistant Project Manager position to reflect everyday duties better); promoting standardized building construction methods and equipment in the district (to generate cost savings in maintenance); ADA compliance; and ensuring that all appropriate district offices are represented at all planning meetings and that principals and site staff are timely updated throughout project execution that may be impacting their schools. The Educational Facilities Planner function will be moved to the Design and Project Management team;

<sup>34</sup> In the late 1960's through the early 1990's, APPA formally stood for the Association of Physical Plant Administrators. Today, the association is known as *APPA: Leadership in Educational Facilities* and is most easily recognized and referred to as simply "APPA."



- v. The creation of a new function, *Training and Continuous Improvement*, that will be accountable and responsible for: developing an organizational change management component to address and manage adverse impacts on employees due to altering organizational structures (reorganization) and changing processes; developing department-wide in-person training activities, including developing and updating training resources; collecting and tracking KPIs and metrics; improving and updating departmental processes and procedures; and creating avenues for soliciting customer service feedback from students, parents, school site staff, and central office staff regarding the customer’s perspective of district facilities and their condition;
- b. Exhibit 20 below illustrates a potential high-level functional reorganization for the Finance Department. Under this reorganization --

**Exhibit 20. Proposed Finance Department Functional Reorganization**

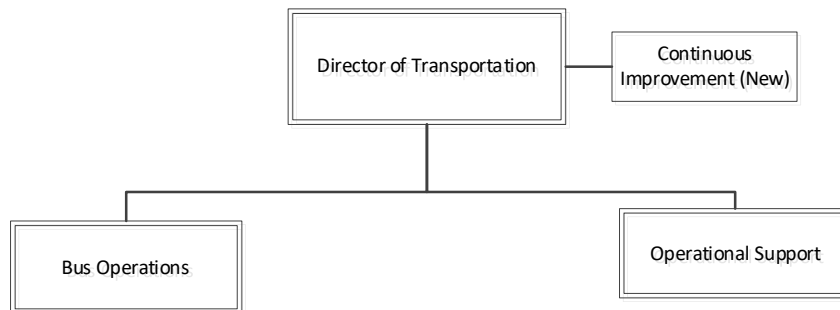


Source: Council of the Great City Schools

- i. The CFO’s span of control is reduced and simplified, permitting increased departmental oversight, metric monitoring, goal setting and monitoring, and employee accountability;
- ii. The accounts payable and payroll functions will move under the auspices of the Director of Accounting, improving departmental alignment and organizational coherence. All other existing functions currently assigned to the Director of Accounting will remain;
- iii. The Medicaid functions are moved and will be under the auspices of the Director of Financial Management. All other existing functions currently assigned to the Director of Financial Management will remain;
- iv. The supervision of the storehouse, distribution center, and mailroom functions are moved for correct alignment to the Office of the Chief Operations Officer;

- v. The existing functions assigned to the Executive Director of Budget, Compliance, and Operating Efficiencies will remain;
  - vi. The creation of a new function, *Training and Continuous Improvement*, that will be accountable and responsible for: developing an organizational change management component to address and manage adverse impacts on employees due to altering organizational structures (reorganization) and changing processes; developing department-wide training activities; collecting and tracking KPIs and metrics; improving and documenting departmental processes and procedures; and creating avenues for soliciting customer service feedback from school sites and central office staff;
- c. Exhibit 21 below illustrates a potential high-level functional reorganization for the Transportation Department. Under this reorganization --

**Exhibit 21. Proposed Transportation Department Functional Reorganization**



Source: Council of the Great City Schools

- i. The Bus Operations function, assisted by the two program administrators, will be responsible for dispatching, internal bus drivers, internal bus attendants, all contracted bus services, troubleshooters, on-time performance, and exceptional service delivery;
- ii. Operational Support will be responsible for highly efficient routing; effective use of the transportation technician position; identifying route consolidation opportunities throughout the school year, safety and training; student discipline; accounting; and bus maintenance;
- iii. The creation of a new function, *Continuous Improvement*, that will be accountable and responsible for: developing an organizational change management component to address and manage adverse impacts on employees due to altering organizational structures (reorganization) and changing processes; monitoring and reporting department-wide goals, collecting and tracking KPIs, metrics, and service level trends; leveraging technology and creating dashboards; improving and documenting

- departmental processes and procedures; and identifying avenues for soliciting and reporting on customer service feedback from students, parents, teachers, school site staff, drivers, attendants, and athletic directors regarding transportation and fleet services;
- d. Repurpose the funding of closed positions due to the reorganization to fund the new positions/functions described in the recommendations;
  - e. Ensure that individuals placed in leadership positions in the new functional organizations have the appropriate skills, expertise, experience, and ongoing training to be successful;
  - f. Fill positions, as necessary, in the reorganizations with individuals who are able and willing to perform required duties and provide staff the autonomy and opportunity to perform their work. Recognize staff when they display quality work products, and hold all staff accountable for results;
  - g. Develop concise reporting relationships with clearly defined job titles, roles, and job descriptions<sup>35</sup> to provide a 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;
  - h. Maximize opportunities for cross-training, capacity building, and promotability within and between operational units and departments; and
  - i. Set appropriate benchmarks, goals, service level plans and standards, employee productivity expectations and measures, and ensure empowerment and accountability across all departments.
6. Implement, with a sense of urgency, a review of all risk and liability concerns identified in this management letter and expeditiously develop appropriate mitigation plans.
  7. Create a committee comprised of leaders from transportation and the Department of Special Education to regularly confer on issues of mutual concern. At a minimum, these discussions should include --
    - a. Establishing when a transportation representative should be present at an IEP meeting to discuss specialized equipment or services a student requires;
    - b. Reviewing existing bus stop placements to ensure the IEP requires door-to-door service;

<sup>35</sup> Most current job descriptions may need updating to align with current or proposed duties.

- c. Identifying opportunities to incorporate *least restrictive environment* practices whenever possible by --
  - i. Identifying SWD students that can be integrated on buses with their non-disabled peers; and
  - ii. Designing runs that will safely accommodate both corner and curb-to-curb stops.
- 8. Schedule monthly meetings with the procurement/purchasing team and the Office of the General Counsel to discuss and update the status of contracts that are “stalled” in the approval queue.
- 9. Build a strategic and coordinated districtwide professional development plan to increase organizational coherence and employee value. This plan, to be championed by the Office of Human Capital, will have all impacted stakeholder groups at the planning table, and together this effort shall --
  - a. Design and implement districtwide professional development plans that engage new and continuing employees, including --
    - i. A well-planned and documented orientation and onboarding process, incorporating linkage awareness of the employee’s role to student outcomes;
    - ii. Job-specific training for new hires and newly promoted staff;
    - iii. Ongoing professional development to enhance job skills and promotional opportunities for current employees,
  - b. Ensuring performance assessment is connected to the responsibilities described in the job description; and
  - c. Developing strategies to “grow your own pipelines” for hard-to-fill positions, including creating an apprentice program open to the community, developing partnerships with community colleges and trade schools, and designing strategies to encourage RCSD high school students to enter RCSD apprentice programs when offered.
- 10. Strengthen stakeholder communication activities to enhance services. Implement meaningful departmental communication outreach with regular meetings with school chiefs, principals, budget and payroll staff, appropriate IT staff, ERP implementation teams, and other appropriate leadership to identify opportunities for improved two-way communication, building trust, and eliminating the perception of information islands and siloed environments.

11. Develop or hire leaders who lead by example to champion knowledge sharing, collaboration, and inclusion. Safeguard communication channels so all employees know --
  - a. The district's and the department's goals and objectives and how they will be achieved to improve student outcomes;
  - 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 employees along with expected outcomes; and
  - e. Employee feedback and suggestions are welcomed and considered so team members know an ongoing process improvement program is in place to encourage innovation.
12. Develop succession planning and cross-training within all departments to ensure knowledge transfer and the orderly transition of responsibilities. Avoid creating organizational dependence on any individual by designing workflow sharing and cross-training to ensure continuity of service in the event of employee unavailability.
13. Design a comprehensive plan to boost employee retention and morale and to provide opportunities for employees at all levels to enhance their skills and learn industry best practices through --
  - a. Continuing efforts to ensure the retention of employees, including the development of safety-net and mentoring programs;
  - b. Evaluating the use of adding or increasing longevity stipends for all district staff;
  - c. Participation in professional organizations;
  - d. Cross-functional teaming and training; and
  - e. Visiting peer districts to gather performance, best practices, recruitment, customer service, and technology leveraging strategies.
14. Examine all department practices and procedures with a laser focus on *customer service* from the customers' perspective. For example, require the timely return of voicemails and emails.

Evaluate and revise current practices to streamline and eliminate roadblocks, improve the department's perception, and enhance the customer experience and expectations.

15. Implement programs to measure customer satisfaction, including customer surveys and focus groups, to identify service concerns and establish future priorities. At a minimum, input from students, parents, school administrators, school site, and central office staff should be solicited.
16. Prioritize the study of establishing a new Enterprise Program Management Office (located in the Office of the Superintendent) that would –
  - a. Create an enterprise-wide program management strategy and governance structure to coordinate strategic priorities and resolve conflicts;
  - b. Develop controls to ensure the district’s leadership team has complete, accurate, and timely information for decision-making;
  - c. Implement methodologies and controls to ensure strategies, directions, and instructions from management are coherent and carried out;
  - d. Ensure new initiatives are fully coordinated with all impacted departments at the planning table; and
  - e. Coordinate cross-functional teams organized around district priorities.
17. Evaluate the impact of phasing-out transportation eligibility for students that move from their current zone of residence into a different zone but wish to remain at the student’s current school of attendance. Specifically --
  - a. Quantify the current costs to transport the several thousand students currently receiving transportation that reside in a different zone than their current school of attendance; and
  - b. Study the feasibility of allowing students who move out of their current school zone to continue with transportation for the remainder of that school year only. Transportation would not be provided after that school year ends.
18. Commence a comprehensive review of all transportation routing processes to identify opportunities to improve transportation routing outcomes. To move forward, RCSD should --
  - a. Establish an annual interdepartmental routing timeline committee to develop appropriate and acceptable deadlines for submitting data and completing tasks. This committee shall comprise key staff from Special Education, Student Assignment, Technology Services,

McKinney-Vento, Foster Care Services, Enrollment Planning, Transportation, and others as appropriate. The committee shall ensure that --

- i. Routing staff has sufficient time to prepare summer and fall routes (incorporating the return to the two-tier system) that are efficient and cost-effective;
  - ii. The timeline includes contractor meetings, and contractors have adequate time for recruiting/hiring/training drivers and monitors, reviewing contract driver backgrounds and driving records, dry run(s), and vehicle maintenance in preparation for the start of the school year;
  - iii. Agreed-upon cutoff date for finalizing routes is enforced before the opening of school;
  - iv. Contractors receive routes on time and can review routing, suggest tier pairing efficiencies, and provide route integrity feedback before the opening of school;
  - v. Monthly contract vendor meetings to improve communication, resolve concerns, and discuss timelines and approaches to improve service delivery;
  - vi. Student routing information provided to school sites before the opening of school is received timely and presented in a clear and logical format;
- b. Use, to the greatest extent possible, the previous school year's ending routing configuration as the starting point for next year's routing. Build routes based on historical knowledge and experience, not total eligibility. During this transition in routing schema, allow for up to 15 percent contingency seating/space and perform adjustments, if necessary;
  - c. Review routing policies and practices to collectively maximize ride times, earliest pickup times, the number of students on each bus (load counts and seat utilization), walk to stop distances, and the number of stops on each run<sup>36</sup> to reduce the number of runs and buses used;
  - d. Design a strategy to monitor actual ridership each day throughout the school year to aggressively identify stops, runs, and ultimately buses that can be consolidated or eliminated;
  - e. Require transportation policy "exceptions" be reviewed and renewed annually and approved by the Office of the Superintendent or designee;

<sup>36</sup> A bus run (also known as a tier) is one component of a bus route. A bus route is comprised of multiple bus runs, such as one, two, or three runs in the morning transporting students to school, and one, two, or three runs in the afternoon returning students to their home or home areas.

- f. Provide current and possible future routing staff refresher and optimization training of the district's routing software;
- g. Develop routing simulations and optimizations utilizing a test database to identify potential efficiencies throughout the routing process;
- h. Integrate, to the greatest extent possible, students from all transportation programs on the same buses, including, as appropriate, Students with Disabilities; and
- i. Create a quality control review process that will ensure, before implementation, that all runs and routes are evaluated as viable, efficient, and within guidelines. Adjust routes as necessary before employing.



## ATTACHMENT A. STRATEGIC SUPPORT TEAM

### **Dr. Raymond C. Hart**

**Dr. Raymond C. Hart** is the Executive Director of the Council of the Great City Schools. Hart, who has more than 30 years of experience in research and evaluation, was previously the Director of Research for the Council, and his work has spanned policy areas such as post-secondary success and college readiness, professional learning communities and school improvement, teacher effectiveness and value-added analysis, early childhood education, and adult and workforce literacy. He has worked with clients from a number of federal agencies, including the U.S. Department of Education, the U.S. Department of Housing and Urban Development, the U.S. Department of State, the National Science Foundation, and many state and local departments of education. Hart recently led the Analytic Technical Support Task for the Regional Educational Laboratory – Mid Atlantic. He served as the Executive Director of Research, Planning and Accountability for Atlanta Public Schools, President and CEO of RS Hart and Partners, which is an evaluation and assessment consulting firm, and an Assistant Professor of Research, Measurement, and Statistics at Georgia State University. Prior to his work as a consultant, Hart served as the Director of the Bureau of Research Training and Services at Kent State University. His career began in 1989 as a program director for African American, Hispanic, and Native American students in Engineering and Science. Hart holds a Ph.D. in Evaluation and Measurement from Kent State University, a M.Ed. with a focus on Curriculum and Instruction – Educational Research from Cleveland State University, and a bachelor's degree in Industrial Engineering from the Georgia Institute of Technology.

### **Willie Burroughs**

**Willie Burroughs**, a veteran school business official, was recently named Director of Management Services for the Council of the Great City Schools. In this position, he will conduct strategic support teams and manage operational reviews for superintendents and senior managers; convene annual meetings of chief financial officers, chief operating officers, human resources directors, chief information officers and technology directors; and field requests for management information. Prior to joining the Council, Burroughs served as the COO for the San Antonio Independent School District, heading the operations services division with more than 1,600 employees. He also served in the Dallas Independent School District as executive director with responsibilities for maintenance, HVAC, grounds, environmental services, custodial, capital improvement, and energy management. In addition, Burroughs held a number of positions with the Houston Independent School District for nearly 11 years, including general manager of construction services (bond), senior manager of contract administration, and senior manager of

special projects. Burroughs holds a Bachelor of Science degree in industrial engineering and an MBA from Clemson University. He was commissioned as an officer in the United States Army Signal Corps.

### **David M. Palmer**

**David Palmer**, Deputy Director (retired), Los Angeles Unified School District (LAUSD), is a forty-year school business operations administration veteran. Mr. Palmer's executive responsibilities included managing and overseeing operations, strategic planning and execution, budget development and oversight, and contract administration. In addition, Mr. Palmer led the design and implementation of performance standards, benchmarks, and accountabilities for staff. He 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 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, is a very active member of the Council's Strategic Support Teams, and has served as the CGCS's Principal Investigator on numerous management and operational reviews.

### **Gary Appenfelder**

**Gary Appenfelder** served as the Director of Purchasing and Ethics for the Metropolitan Nashville Public Schools for over nine years. Prior to that, Mr. Appenfelder had over 30 years of experience in private industry Procurement, Supply Chain, and Operations Management with a variety of world-leading companies such as Texas Instruments, Koch Industries, and Cray Research. He is a graduate of the U.S. Naval Academy and served his country for nine years as a U.S. Marine Corps jet pilot.

### **Sam Bays**

**Sam Bays** is currently assigned as the Executive Director of Capital Programs, overseeing the execution of the District's \$1.5 Billion Capital Renovation Program known as SMART (Safety, Music and Arts, Athletics, Renovation, and Technology) via in-house staff and two outside teams of Program Management Professionals, totaling about 200 individuals all together. For the prior decade he was the Director of Physical Plant Operations for Broward County Public Schools, the sixth largest school district in the United States and the second largest in Florida. This department

of 700 professional, technical, and administrative/managerial employees maintains 39 million square feet in 241 schools, centers, and technical colleges, serving 270 thousand students. He earned his Master of Business Administration from the University of Florida and has a Bachelor of Science in Industrial / Construction Management from West Virginia Institute of Technology (now known as WVU). He is a State of Florida General Contractor, a LEED® Accredited Professional, a Certified Building Commissioning Professional, and a Six Sigma Green Belt.

### **Alex Belanger**

**Alex Belanger** is the Chief Executive for Operational Services at Fresno Unified School District (FUSD), the third largest school district in California. FUSD is comprised of 3,862 Classrooms located at 99 schools with 12 non-instructional sites totaling, 8.26 M square feet on 1,277.66 acres with 74,000 students enrolled. Mr. Belanger has over 31 years of experience in general contracting and recovery of major public/private construction projects, public/commercial maintenance and operations services, construction management and public and private design/sustainability program management. He has successfully managed and recovered projects for Department of Defense, Department of Transportation, healthcare, hospitality and K-12 education / community college / universities, commercial/retail facilities. His background is further diversified with his experience in developing and managing projects/programs in the oilfield/mining industry on the North Slope of AK in sensitive tundra wetland areas. As a private consultant he managed projects/programs in the Arctic Circle for NANA Regional Corporation, Pedro Bay Village Corporation and Iliamna Village Corporation from inception to closeout establishing/developing opportunities for community economic development. Commercially he managed NMS (NANA/Sodexo partnership) Facilities Management Department one of the largest privately held M&O companies in Alaska. Prior to being recruited to Fresno Unified School District Alex was hired as Assistant Director of Maintenance and Operations as a recovery specialist to address and improve maintenance and operations related to safety, productivity, equity, and quality control at ASD. Mr. Belanger is a Licensed General Contractor in the state of Alaska, holds a PM Certification from Parsons Brinckerhoff/Harvard online, qualified at a GS-11 Principal Supervising Construction Coordinator for DOD and a Journeyman Carpenter. Alex also serves on the committees overseeing West Fresno Specific Plan Steering Committee, Fresno City Parks/Trails revitalization and City of Fresno Capitol Projects Oversight. He is an acting board member on West Fresno Community Economic Development Corporation and Central Unified School District Bond Oversight Committee. He is a member of CMAA Construction Manager Association of America. His most recent recognitions are ACSA Classified Leader of the Year Region IX and was part of a team that received the AIA Design *Award of Merit* for Philip J. Patiño School of Entrepreneurship; supported CGCS reviews in; Puerto Rico, Broward FL, Buffalo NY, Rochester NY and was the M.C. for CGCS National online COO conference.

### **Nathan Graf**

**Nathan Graf** has been the Senior Executive Director of Transportation and Vehicle Maintenance for the San Antonio Independent School District since March 2017. Mr. Graf earned a master's degree in business administration (M.B.A.) from The University of Texas at Austin, earning the distinction of a Sord Honors Graduate. He also earned a B.S. in Psychology from The University of Houston, graduating with Honors. Mr. Graf served for 15 years in various management roles, each with increasing responsibility, for The Houston Independent School District (HISD); 9 of these years were in transportation. Under his leadership both HISD and SAISD have earned many industry awards and recognition for the efficiency and effectiveness of their transportation services from organizations such as The Council of the Great City Schools, The 100 Best Fleets in the Americas, The City of Houston, The City of San Antonio, the Propane Education and Research Council, District Administration Magazine, Telly Awards, School Transportation News and School Bus Fleet Magazine. He has authored and managed many grants worth several million dollars to introduce propane school buses into both the HISD and SAISD fleets. Since March 2017 about 40% of SAISD route buses are now fueled by propane and SAISD is the only school district in Bexar County to have 100% of route buses that have Wi-Fi, interior and exterior cameras, GPS, and a parent school bus tracking app. Mr. Graf believes passionately in building a strong and energetic team that encourages innovative ideas that come to life such as the SAISD Rolling Reader Program, the School Bus Stop Arm Camera Program, the Clean Green Yellow School Bus Machines Program, and SAISD Eats Meal Delivery Buses.

### **Kris Hafezizadeh**

**Kris Hafezizadeh** is the Executive Director of Transportation and Vehicle Services for Austin Independent School District. (AISD). AISD provides services to over 75,000 students. Mr. Hafezizadeh began his career in student transportation in 1989 and has been in a leadership role since 1991. He has been active in the National Association for Pupil Transportation and Texas Association for Pupil Transportation and has chaired numerous committees in both associations. He was recognized by the Council of Great City Schools in 2014. In his role at AISD, he directs the daily operation of Transportation Services which transports over 23,000 students daily on 335 routes that cover an annual total of 6 million miles. In addition to yellow bus, Transportation Services also maintains over 400 vehicles in its white fleet used by a variety of departments in the District. He is a graduate of Texas State University in San Marcos with a B.S. in Business Administration.

## **Kathi Hayward**

**Kathi Hayward** retired as the Executive Director – Operations Business Services for the Dallas Independent School District (DISD), the 2<sup>nd</sup> largest school district in Texas and the 14<sup>th</sup> largest district in the nation. As the ED-OBS, she managed financial operations with a \$284M budget, 3000 employees including 4 direct reports, and 200+ indirect reports with responsibility for serving as principal advisor to the Chief Operation Officer. Prior to her work at DISD, she was the Assistant Controller for Houston Independent School District (HISD) the largest school district in Texas and the 7<sup>th</sup> largest district in the nation. She operated and managed integrated accounting systems with responsibility for safeguarding fiscal assets while administering expenditures and adhered to fiscal internal control procedures for the district's \$1.62B budget. Led preparation efforts of the Annual Fiscal Management Report. Over the course of her career, she successfully served as Executive Director – Operations Business Service, Controller, Director of Accounting Services, Vice President- Business & Finance, and Assistant Controller in public school district and higher education milieus. She has developed effective report generation applications and optimized technology to streamline operations and introduce new systems that achieve substantial cost savings. Additionally, she has served on teams to develop the curriculum for the staff along with evaluation protocols that improve employee retention and integrate compensation plans. Kathi took a vision and made it a reality through sound strategy development. She intuitively saw the threads of opportunity that wind through an organization, brings them together into a coherent whole, helped others extend their thinking, and drove material business advantage. She was an inspirational leader who told stories that inspire action while at the same time was grounded in financial information that levers the business. Respected as a credible voice in decision-making, finding strategic financing partners, and establishing governance boundaries, she earned a seat at the table wherever she served. Kathi is an experienced business executive with proven capabilities in a variety of leadership and general management areas including strategic and operational alignment, organizational design, business process improvement, and financial management. She has extensive experience in startup and turnaround environments. Kathi earned her Master of Business Administration from East Texas Baptist University in Marshall TX and holds a Bachelor of Business administration from the University of Oklahoma, Norman Ok. She currently resides in Tulsa, Ok, and in her leisure time – enjoys watching collegiate sports, fishing, walking, reading, and spending time with family.

## **Judith M. Marte**

**Judith Marte** has over 34 years experience in K-12 operations and finance. Her career began in Lawrence, Massachusetts where she served as Executive Director, Business Services and supervised all non academic functions including finance, technology, food services, transportation, maintenance, custodial services, facilities construction, school safety and human resources for 13 years. After relocating to South Florida, she rose through the ranks at the Miami-Dade County Public Schools, the 4<sup>th</sup> largest District in the Nation where she served for 16 years. Her roles

included Budget Analyst, Director, Cost and Business Services, Executive Director, Financial Reporting Grants, Chief Budget Officer, Deputy CFO and Chief Financial Officer. In 2017, she left to join the Broward County Public Schools, the 6<sup>th</sup> largest District in the Nation as their CFO. After serving in that role over four years, Mrs. Marte left for a short time and returned under the leadership of newly appointed superintendent Dr. Vickie L. Cartwright to the role of Deputy Superintendent, Operations. In 2017, Mrs. Marte was recognized by the Council of Great City Schools as the recipient of the Bill Weiss Award for her commitment to Urban Schools. She received her Bachelors of Science from Merrimack College in North Andover, Massachusetts and her MBA from University of New Hampshire. She works with Government Finance Officer's Association as a budget reviewer, with the Council of Great City Schools as a member of the mentoring program leadership and State of Florida Finance Council for Schools.

### **Robert N. Waremburg**

**Robert N. Waremburg**, NIGP-CPP, CPPO serves as Senior Director, Procurement Services for Orange County Public Schools in Orlando Florida. Mr. Waremburg has over 34 years experience leading Procurement departments in four districts across Florida. The OCPS Procurement Department is regularly recognized by the National Procurement Institute and Florida Association of Public Procurement Officials with Awards of Excellence in Public Procurement. When possible and appropriate, Procurement Services enables efficient processing of the purchase orders. Under Mr. Waremburg's leadership, internal controls were established using an e-procurement system internally developed known as iBuy, to allow automatic conversion of small, routine purchases from established contracts once the orders are entered into the system, available budgets are confirmed and committed, and necessary staff verify they have completed an administrative review. Orders processed automatically meeting criteria established by the internal system controls represent 25 percent of all of the Purchase Orders processed thereby reducing the administrative processing time. Over the last fiscal year, the district spent over \$68 million in direct spend with small businesses including minority and woman-owned business enterprises (MWBs), local developing businesses (LDBs) and Veteran Owned Business (VBEs). In addition, to the direct spend noted above, Mr. Waremburg also strongly advocates for small business by tracking participation with our construction program where certified small business enterprises receive 26 percent of the value of our construction contracting by serving OCPS both as prime contractors or as subcontractors. Construction contracts awarded for last fiscal year were in excess of \$161 million. Last fiscal year the Procurement Services Department calculated \$42 million in savings through procurement activities and a total of \$140 million in calculated savings for the past five years. Savings achieved through professional procurement activities represents the value the Procurement Department provides to the district by allowing resources that would otherwise have been spent, to be directed to other district priorities. Mr. Waremburg received his Masters of Business Administration for the University of North Florida in Jacksonville, Florida.

## ATTACHMENT B. WORKING AGENDA

### CGCS Strategic Support/Technical Assistance Team

#### Finance and Support Services Review

#### Rochester City School District

June 27-30, 2022

#### Contacts:

#### **Dr. Genelle Morris**

Deputy Superintendent of Operations and System Innovation

Email: Genelle.Morris@rcsdk12.org

#### **Jerika Turner**

Executive Assistant

#### **Subject to Change As Required**

#### **June 27, Monday**

6:45 Meet in Hotel Lobby

7:00 Dinner Meeting

**Dr. Lesli Myers-Small**  
Superintendent

**Dr. Kathleen Black**  
Deputy Superintendent

**Dr. Genelle Morris**  
Deputy Superintendent  
Others TBD

#### **June 28, Tuesday**

6:30 Meet in Hotel Lobby

7:00 - 7:45 Continental Breakfast  
131 W. Broad Street

8:15 - 9:15 Team Interviews  
Willie Burroughs  
Dave Palmer  
Sam Bays

**Michael Schmidt**  
Chief of Operations

	Alex Belanger Nathan Graf Kris Hafezizadeh	
	Team Interview Bob Carlson Judith Marte Kathi Hayward Gary Appenfelder Robert Waremburg	<u>Chief Financial Officer</u> <b><u>Carrie Pecor</u></b> Executive Director of Grants <b><u>Judith Schuster</u></b> Project Resource Manager
9:30 - 10:30	Team Interview Bob Carlson Judith Marte Kathi Hayward Gary Appenfelder Robert Waremburg	<b><u>Glen Vanderwater</u></b> Chief Technology Officer <b><u>Martin Lafrati- lafrari</u></b> Manager, Business Enterprise Applications
	Team Interview Willie Burroughs Sam Bays Alex Belanger	<b><u>Thomas Keysa</u></b> Director, Educational Facilities
	Team Interview David Palmer Nathan Graf Kris Hafezizadeh	<b><u>Wayne Kitleberger</u></b> Director, Internal Transportation Services <b><u>Cindy Streber</u></b> Assistant Director
10:45 -11:30	Team Interview Bob Carlson Judith Marte Kathi Hayward Gary Appenfelder Robert Waremburg	<b><u>Glendine Miller</u></b> Director, Financial Management <b><u>Elizabeth Spalty</u></b> Senior Budget Analyst <b><u>Cheryl Sarkis</u></b> Contract Administrator
	Team Interview Willie Burroughs Sam Bays Alex Belanger	<b><u>Matthew Seeger</u></b> Supervisor, Plant Maintenance
	Team Interview David Palmer Nathan Graf Kris Hafezizadeh	<b><u>Stephanie Morrill</u></b> Director, External Transportation Services
12:00 - 12:45	Lunch	



1:00- 1:45

Team Interview  
Bob Carlson  
Judith Marte  
Kathi Hayward  
Gary Appenfelder  
Robert Waremburg

**Terry Hessler**  
Executive Director, Budget  
**Michael Cordaro**  
Senior Budget Analyst

Team Interview  
Willie Burroughs  
Sam Bays  
Alex Belanger

**Donald Robertson**  
Supervising Custodian Engineer  
**Lillie Wilson**  
**Kenneth Williams**  
Assistant Supervising Custodian Engineers

Team Interview  
David Palmer  
Nathan Graf  
Kris Hafezizadeh

Routing Expeditors

2:00 - 2:45

Team Interview  
Bob Carlson  
Judith Marte  
Kathi Hayward  
Gary Appenfelder  
Robert Waremburg

**Cerri Cupples**  
Director, Accounting  
**Steven Nowak**  
Principal Accountant  
**Mike Mahaney**  
Capital Accounting, Management Analyst  
**Rayanna Chambers**  
Manager, Financial Reporting  
**Robert Kwiecien**  
Cash Management Analyst

Team Interview  
Willie Burroughs  
Sam Bays  
Alex Belanger  
Team Interview  
David Palmer  
Nathan Graf  
Kris Hafezizadeh Interview

**David Strabel**  
Educational Facilities Planner

**Brenda Ellison-Rodriguez**  
Program Administrator, General Education

3:00 – 3:45

Team Interview  
Bob Carlson  
Judith Marte  
Kathi Hayward

**Kim Huffman**  
Controller  
**Susan Maxwell**  
Principal Payroll Clerk  
**Michelle Watson**  
Management Analyst  
**Theresa Dinolfo Dup**  
Senior Payroll Clerk

	Team Interview Gary Appenfelder Robert Waremburg	<b><u>Amanda Dunn</u></b> Coordinator of Supplemental Funds
	Team Interview Willie Burroughs Sam Bays Alex Belanger	<b><u>Stacie Darbie</u></b> Environmental Health& Safety
	Team Interview David Palmer Nathan Graf Kris Hafezizadeh	<b><u>Richard Ciccone</u></b> Program Administrator, SPED Transportation
4:00 - 4:45	Team Interview Bob Carlson Judith Marte Kati Hayward Gary Appenfelder Robert Waremburg	<b><u>Derreck Blair</u></b> Dir, Management & Distribution <b><u>Kevin Cain</u></b> Accounts Payable Accountant
	Team Interview David Palmer Nathan Graf Kris Hafezizadeh	<b><u>Nick Gonzalez</u></b> Safety Coordinator <b><u>Ronald Wade</u></b> Discipline Coordinator
	Team Interview Willie Burroughs Sam Bays Alex Belanger	<b><u>Erik Hansen</u></b> Design Group Project Architect <b><u>Todd Bruce</u></b> Associate Architect
5:00	Team Discussion of Work Plan	
<b><u>June 29, Wednesday</u></b>		
6:30	Meet in Hotel Lobby	
7:00 -	Site Visit David Palmer Nathan Graf Kris Hafezizadeh	<b><u>Bus Yard</u></b>
	Site Visits Willie Burroughs Sam Bays Alex Belanger	<b><u>Schools Randomly Selected</u></b>

7:00 – 8:00	Continental Breakfast 131 W. Broad Street	
8:00 - 8:45	Team Interview Bob Carlson Judith Marte Kathy Hay	<b><u>Theresa Dinolfo</u></b> <b><u>Janice Fridman</u></b> Senior Payroll Clerks
	Team Interview Gary Appenfelder Robert Waremburg	<b><u>Tim Schmandt</u></b> Director, Procurement & Supply
9:00 - 9:45	Team Interview Bob Carlson Judith Marte Kati Hayward	<b><u>Theresa Dinolfo</u></b> <b><u>Janice Fridman</u></b> Senior Payroll Clerks
	Team Interview Gary Appenfelder Robert Waremburg	<b><u>Ernest Pavone</u></b> Storehouse Supervisor
	Team Interview Willie Burroughs Sam Bays Alex Belanger	<b><u>John Goodwin</u></b> <b><u>Alvin DeLeon</u></b> <b><u>Pete DiBenedetto</u></b> <b><u>Edward Tyndall</u></b> Roddy Johnson Miguel Gonzalez Foremen, Maintenance Mechanics
	Team Interview David Palmer Nathan Graf Kris Kris Hafezizadeh	<b><u>Byron Nobel</u></b> Supervisor, Bus Maintenance <b><u>Guy Herd</u></b> Parts Clerk
10:00 – 10:45	Team Interview Gary Appenfelder Robert Waremburg	<b><u>Nicole Klimek</u></b> Senior Information Svc. Business Analyst
	Team Interview Bob Carlson Judith Marte Kati Hayward	<b><u>Susan Harriff</u></b> <b><u>Kathryn Stewart-iles</u></b> AP Account Clerks
	Team Interviews Willie Burroughs	<b><u>Timothy Lockwood</u></b> Facilities Utilization

	Sam Bays Alex Belanger	<b><u>Sheila Watkins</u></b> Building Permit Officer
	Team Interviews David Palmer Nathan Graf Kris Hafezizadeh	<b><u>Bus Attendants</u></b> Randomly Selected
11:00 – 11:45	Team Interviews Bob Carlson Judith Marte Kati Hayward	<b><u>Mike Sausa</u></b> Medicaid Analyst <b><u>Lorraine Tantillo</u></b> <b><u>Damian Camacho</u></b> Assistant Medicaid Analysts
	Team Interview Gary Appenfelder Robert Waremburg	<b><u>Emily Torres-Casillo (Why??)</u></b> Director, Employee Benefits
	Team Interviews Willie Burroughs Sam Bays Alex Belanger	<b><u>Lillie Wilson DUP</u></b> <b><u>Kenneth Williams DUP</u></b> Asst Supervising, Custodial Engineers
	Team Interview David Palmer Nathan Graf Kris Hafezizadeh	<b><u>Bus Dispatchers</u></b> Randomly Selected
12:00 – 12:45	Lunch	
1:00 - 1:45	Team Interview Bob Carlson Judith Marte Kati Hayward Gary Appenfelder Robert Waremburg	<b><u>David Adams</u></b> Manager, Financial Reporting <b><u>Juli-Lyn Colpoys</u></b> <b><u>Senior Budget Analyst (Federal)</u></b> <b><u>Abby Clymer</u></b> Management Analyst <b><u>Rayana Chambers</u></b> Manager, Financial Reporting <b><u>Timothy Walz</u></b> <b><u>Donald Robertson</u></b> School Construction Inspectors
	Team Interview Willie Burroughs Sam Bays Alex Belanger	
	Team Interview David Palmer	<b><u>Byron Nobel</u></b> Supervisor, Bus Maintenance

	Nathan Graf Kris Hafezizadeh	<b><u>Guy Herd</u></b> Parts Clerk
2:00 - 2:45	Team Interviews David Palmer Nathan Graf Kris Hafezizadeh	<b><u>Deserie Richmond</u></b> Acting Chief of Special Education <b><u>Melissa Pittman</u></b> Director, Special Education <b><u>Kimberly Morales Whitehead</u></b> Assoc. Dir., Student Placement
	Others TBD	
3:00 - 4:15	Team Interviews	8 Elementary Principals 4 Secondary Principals Reflecting District Diversity
4:30	Team Discussion of Work Plan	
<b><u>June 30 (Thursday)</u></b>		
7:00 - 8:00	Continental Breakfast	
9:00 - 11:45	Team Meeting	<b>Synthesis of Findings &amp; Recommendations</b>
12:00 - 1:00	Luncheon Meeting	<b><u>Dr. Leslie Myers-Small</u></b> Superintendent <b><u>Dr. Genelle Morris</u></b> Deputy Superintendent of Operations Others (TBD)
1:15	Team Departures	

## ATTACHMENT C. DISTRICT PERSONNEL INTERVIEWED

- Dr. Leslie Myers-Small, Superintendent
- Dr. Genelle Morris, Deputy Superintendent of Operations and System Innovation
- Dr. Carmine Peluso, Chief of Schools
- Michael Schmidt, Chief of Operations (via video conference)

### Facilities

- Thomas Keysa, Director of Facilities
- Mathew Seeger, Plant Maintenance Supervisor (via video conference)
- Donald Robinson, Supervising Custodian Engineer
- Lillie Wilson, Assistant Supervising Custodian Engineer
- Mathew Gordon, Assistant Supervising Custodian Engineer
- David Strabel, Educational Facilities Planner
- Stacie Darbie, Environmental Health and Safety
- Eric Hanson, Design Group Project Architect
- Todd Bruce, Associate Architect
- John Goodwin, Maintenance Mechanic Foremen
- Alvin DeLeon, Maintenance Mechanic Foremen
- Nate DeBenedetto, Maintenance Mechanic Foremen
- Edward Tyndall, Maintenance Mechanic Foremen
- Sheila Watkins, Maintenance Mechanic Foremen
- Enrollment Capacity Spreadsheet

### Finance

- Vernon Connors, Interim Chief Financial Officer (via video conference)
- Carrie Pecor, Executive Director of Grants
- Glen VanDerwater, Chief Technology Officer
- Glendine Miller, Director of Financial Management
- Cheryl Sarkis, Contract Administrator
- Elizabeth Spalty, Senior Budget Analyst
- Terry Hesseler, Executive Director of Budget, Compliance, and Operating Efficiencies
- Michael Cordaro, Senior Budget Analyst
- Cerri Cupples, Director of Accounting
- Steven Nowak, Principal Account
- Mike Mahaney, Management Analyst

- Robert Kwiecien, Cash Management Analyst
- Shauna Seeley, Associate Accountant
- Susan Maxwell, Principal Payroll Clerk
- Michelle Watson, Management Analyst
- Derrek Blair, Director of Financial Management
- Theresa Dinolfo, Senior Payroll Clerk
- Janice Fridman, Senior Payroll Clerk
- Lorraine Tantillo, Assistant Medicare Analyst
- Damian Camacho, Assistant Medicare Analyst
- Juli-Lyn Colpoys, Senior Budget Analyst
- Abbey Clymer, Senior Management Analyst

#### Procurement

- Tim Schmandt, Director of Procurement and Supply
- Amanda Dunn, Coordinator of Supplemental Funds
- Nicole Klimek, Senior Information Service Business Analyst
- Emily Torres-Casillo, Director, Employee Benefits
- Mandi Harvey, Purchasing Assistant
- Linda Game, Senior Buyer

#### Transportation

- Stephanie Morrill, Director of Transportation
- Robin Fogle, Routing Expediter
- Wilbert Navedo, Routing Expediter
- Nicholas Gonzalez, Safety Coordinator
- Deserie Richmond, Acting Chief of Special Education and Specialized Programs
- Stephanie Yehl Associate Director of Special Education
- Kimberly Morales-Whitehead, Associate Director of Special Education
- Barbara Grozewski, (Outside Vendor) School Bus Provider
- Victoria Yuzbasheva, (Outside Vendor) School Bus Provider
- Christian Hanlon (Outside Vendor) School Bus Provider
- Damon Mustaca (Outside Vendor) School Bus Provider
- Priscilla Rodriguez, Bus Dispatcher
- Johlen Hunt, Bus Dispatcher
- Roberto Lorenzo, Driver

- Byron Nobel, Bus Maintenance Supervisor
- Guy Herd, Parts Clerk

#### Site Visits

- Franklin Secondary School
- Hudson Elementary School
- Jefferson Secondary School
- Marshall (vacant, used for swing space)
- North East College Preparatory High School
- Reynolds Elementary School
- RISE Community School (Elementary)
- Townson Elementary School
- Transportation Offices and Bus Parking Facility



## ATTACHMENT D. DOCUMENTS REVIEWED

- RCSD Enrollment 2021, dated November 15, 2021
- Board of Education Work Session, Elementary School Closures and Mergers, January 13, 2022
- RCSD Organizational Charts, updated June 13, 2022
- All non-instructional Job Descriptions
- NY State Attendance by District
- NCES 2020 Summary Enrollment and Staffing Information
- SIRS-313 BEDS Day Enrollment by Location of Enrollment
- District Profile, dated February 10, 2022
- RCSD Staff Handbook

### Budgets:

- 2022-2023 Adopted Budget, adopted May 10, 2022
- 2022-2023 Budget for the Board of Education, Draft, dated April 7, 2022
- 2022-2023 Budget for the Board of Education, Draft, dated March 22, 2022
- State Monitor Shelley Jallow Update on Proposed 2022-2023 Budget, dated March 24, 2022
- 2021-2022 Budget for the Board of Education, Draft, dated March 23, 2021
- 2021-2022 Proposed Budget for the Board of Education, dated May 13, 2021
- 2020-2021 Proposed Budget for the Board of Education, dated May 7, 2020
- 2019-2020 Proposed Budget for the Board of Education, dated May 7, 2019
- Annual Comprehensive Financial Report, FY Ended June 30, 2021
- Annual Comprehensive Financial Report, FY Ended June 30, 2020
- Long Range Financial Plan, dated April 8, 2022
- OHC ARP Budget Codes
- OHC ARP Funded positions programs

### CBA and Contracts:

- Contract Agreement Between the City School District of Rochester, New York, and the Association of Supervisors and Administrators of Rochester, July 1, 2019, through June 30, 2024
- Contract Agreement Between the City School District of Rochester, New York, and BENTE/AFSCME Local 2419 (AFL-CIO), July 1, 2021, through June 30, 2024
- Contractual Agreement Between the CSDR, New York, and the Association of Supervisors and Administrators of Rochester, July 1, 2019, through June 30, 2024
- Contractual Agreement Between the CSDR, New York, and the Association of Supervisors and Administrators of Rochester, July 1, 2014, through June 30, 2018
- Contractual Agreement Between the CSDR, New York, and BENTE/AFSCME Local 2419 (AFL-CIO), July 1, 2021, through June 30, 2024
- BENTE/AFSCME Local 2419 (AFL-CIO), July 1, 2017, through June 30, 2021

- MOU By and Between the RCSD and the Board of Education Non-teaching Employees (BENTE), AFSCME Local 241, July 1, 2021, through June 30, 2024
- Rules and Regulations of the Board of Education Relating to Exempt Employee group, Resolution No. 2015-2016:881, approved June 29, 2016
- Rules and Regulations of the Board of Education relating to Superintendent and Board Employees Groups (Resolution No. 2015-2016: 858, approved June 16, 2016)
- Negotiations Approach in the RCSD Memorandum to Superintendent, dated February 09, 2021
- Cloud ERP Project Charter, Project ID: ERP-001, dated March 04, 2022

#### Facilities

- 2022-2023 Facilities Organizational Chart, R2
- 2022-2023 Facilities Organizational Chart
- 2020-2021 CIP – Revised Version, May 25, 2021
- 2022-2023 CIP – May 20, 2022
- 1981 CPR Debt Authorization Policy
- 2022-2023 SSRA Memo, May 23, 2022
- 2022-2023 SSRA Guided Responses, May 23, 2022, v2
- Consultant RFP/Contracts Process
- RCSD Design Group Department Overview
- Design Group Yearly Task Overview
- MWBE Compliance Process
- BCS Report
- RCSD Work Orders 2021-2022
- Insurance Certificates
- General Services Contract Process
- Sequence of Events for Projects
- Table of Contents Sr Office Acct Clerk
- RCSD Department of Law, Contract Training 2020
- LIENS General Information
- Maintenance – Service Contractor Work Procedures
- SED Change Order Requirements for Change Order Certification Form
- Parking Payments
- Payment Applications for Contractor’s Guide
- PO Amendments General Services Contracts
- Steps to Perform After BOE Meeting Contract Approval

- Facility Services Handbook, November 1996, revised June 2022
- RCSD Facilities General Cleaning
- RCSD Facilities Renovation Cost Summary
- RCSD Managed Square Footage, March 2016
- 2021-2022 Projects Budget Summary
- 2020-2021 Project Budget Summary
- 2019-2020 Projects Budget Summary
- 2018-2019 Projects Budget Summary
- 2017-2018 Projects Budget Summary
- CIP-FMP Coordination, February 25, 2022
- Draft #1 – Selection Matrix, November 12, 2021
- CIP Renovation Summary 2020-2021

#### Finance

- Organizational Chart of the Office of the Chief Financial Officer, updated June 2, 2022
- Finance Organization Historical Actuals (FYs 2020 and 2021) and Current Budget (2022)
- Grant Feasibility Analysis
- Grant Brief
- Evaluation of the Enterprise Business Systems in the RCSD, prepared by the Council of the Great City Schools, July 2003
- Finance Committee Meeting, October 20, 2020
- 2021 Annual Comprehensive Financial Report
- 2020 Annual Comprehensive Financial Report

#### Transportation

- Organizational Chart, Transportation Services
- RCSD Policy Manual, Transportation of Students and Others
- Efficiency Study of the RCSD, Pupil Transportation Program, Interim Report, by the Pupil Transportation Safety Institute, September 12, 2017
- Spreadsheet of Receiving Schools by Type
- NY State Transportation Costs (Students Transported), June 2021
- Line-Item Spending by Function
- Evaluation of the Transportation Operations of the Rochester Public Schools, by the Council of the Great City Schools, dated March 2004
- Spreadsheet of Total 2021-2022 Students Transported

- Transportation Practices Survey Form
- Spreadsheet of Specialized Service Sites

## ATTACHMENT E. CGCS – FINANCE KPIS

- |                  |   |
|------------------|---|
| Accounts Payable | <ol style="list-style-type: none"> <li>1. AP Cost Per \$100K Revenue</li> <li>2. AP Cost Per Invoice</li> <li>3. Invoices - Days To Process</li> <li>4. Invoices Processed Per FTE per Month</li> <li>5. Invoices - Past Due at Time of Payment</li> <li>6. Payments Voided</li> <li>7. Payments Voided Due To Duplication</li> <li>8. Payments Voided Due To Error</li> <li>9. P Staff - Accountants With AP Certificate</li> <li>10. AP Staff - Accountants With CPA</li> <li>11. AP Staff - Cost Per FTE</li> <li>12. AP Staff - District FTEs Per AP FTE</li> <li>13. AP Staffing Ratio - Clerical And Support</li> <li>14. AP Staffing Ratio - Managers</li> <li>15. AP Staffing Ratio - Professionals</li> <li>16. AP Staffing Ratio - Supervisors</li> <li>17. Invoices - Percent Paid Electronically</li> <li>18. Invoices - Percent Received Electronically</li> </ol> |
| Cash Management  | <ol style="list-style-type: none"> <li>1. Cash Flow - Short-Term Loans Per \$100K Revenue</li> <li>2. Investment Earnings Per \$100K Revenue</li> <li>3. Cash/Investment Equity Per \$100K Revenue</li> <li>4. Investment Earnings As Percent Of Cash/Investment Equity</li> <li>5. Treasury Staffing Cost Per \$100K Revenue</li> <li>6. Treasury Staff - Cost Per FTE</li> <li>7. Treasury Staff - District FTEs Per Treasury FTE</li> <li>8. Treasury Staffing Ratio - Clerical And Support</li> <li>9. Treasury Staffing Ratio - Managers</li> <li>10. Treasury Staffing Ratio - Professionals</li> <li>11. Treasury Staffing Ratio - Supervisors</li> </ol>  |
| Compensation     | <ol style="list-style-type: none"> <li>1. Pay Checks Processed Per FTE per Month</li> <li>2. Payroll Cost Per \$100K Spend</li> <li>3. Payroll Cost Per Pay Check</li> <li>4. Pay Checks - Errors Per 10K Payments</li> <li>5. Payroll Staff - Overtime Hours Per FTE</li> </ol>  |

6. Personnel Record Self-Service Usage per District FTE
7. W-2 Correction Rate (W-2C)
8. Pay Checks - Direct Deposits
9. Pay Checks - Percent Off-Cycle
10. Payroll Cost Per \$100K Revenue
11. Payroll Outsourcing As Percent Of Costs
12. Payroll Staff - Cost Per FTE
13. Payroll Staff - District FTEs Per Payroll FTE
14. Payroll Staffing Ratio - Clerical And Support
15. Payroll Staffing Ratio - Managers
16. Payroll Staffing Ratio - Professionals
17. Payroll Staffing Ratio - Supervisors
18. Personnel Records Self-Service Usage: Address Changes
19. Personnel Records Self-Service Usage: Direct Deposit Changes
20. Personnel Records Self-Service Usage: W-4 Changes

Financial  
Management

1. Debt Principal Ratio To District Revenue
2. Debt Servicing Costs Ratio To District Revenue
3. Expenditures Efficiency - Final Budget As Percent Of Actual
4. Fund Balance Ratio (A) Unassigned
5. Fund Balance Ratio (B) Uncommitted
6. Fund Balance Ratio (C) Unrestricted
7. Revenues Efficiency - Final Budget As Percent Of Actual
8. Expenditures Efficiency - Adopted Budget As Percent Of Actual
9. Revenues Efficiency - Adopted Budget As Percent Of Actual
10. Debt Servicing Costs Ratio to Total Debt
11. Fund Balance - Percent (a) Unassigned
12. Fund Balance - Percent (b) Assigned
13. Fund Balance - Percent (c) Committed
14. Fund Balance - Percent (d) Restricted
15. Fund Balance - Percent (e) Nonspendable
16. Fund Balance Ratio (D) All Except Nonspendable
17. Fund Balance Ratio (E) All Types

Grants Management

1. Grant Funds As Percent Of Total Budget
2. Grant-Funded Staff As Percent Of District FTEs
3. Returned Grant Funds Per \$100K Grant Revenue
4. Amendments To Grant Budgets

5. Competitive Grant Funds As Percent Of Total
6. Days To Access New Grant Funds
7. Grants Receivables Aging
8. Grant Funds - Percent Federal
9. Grant Funds - Percent Local/Private
10. Grant Funds - Percent State
11. Grants Receivables Aging - Days To Process
12. Grants Receivables Aging - Days To Receive Payment
13. Returned Grant Funds - Federal
14. Returned Grant Funds - Local/Private
15. Returned Grant Funds - State

## ATTACHMENT F. CGCS – MAINTENANCE AND OPERATIONS KPIS

1. Custodial Work - Cost Per Square Foot
2. Custodial Workload
3. Major Maintenance - Cost Per Student
4. Renovations - Cost Per Student
5. Routine Maintenance - Cost Per Square Foot
6. Work Order Completion Time (Days)
7. Custodial Supply Cost Per Square Foot
8. M&O Cost Per Student
9. M&O Costs Ratio to District Operating Budget
10. Major Maintenance - Design To Construction Cost Ratio
11. New Construction - Cost Per Student
12. New Construction - Design To Construction Cost Ratio
13. Recycling - Percent Of Total Material Stream
14. Renovations - Design To Construction Cost Ratio
15. Routine Maintenance - Cost Per Work Order
16. Utility Costs - Cost Per Square Foot
17. Building Square Footage By Ownership - Percent Leased
18. Building Square Footage By Type - Percent Modular
19. Building Square Footage By Type - Percent Portable
20. Building Square Footage By Type - Percent Site-Built
21. Building Square Footage By Usage - Percent Academic
22. Building Square Footage By Usage - Percent Non-Academic
23. Building Square Footage By Usage - Percent Vacant
24. Custodial Work - Cost Per Square Foot, Contractor-Operated
25. Custodial Work - Cost Per Square Foot, District-Operated
26. Custodial Work - Cost Per Student
27. Custodial Work - Proportion Contractor-Operated
28. Custodial Work - Staff Ratio - Field Workers Per Office Staff
29. Custodial Work - Staff Ratio - Non-Exempt Per Exempt Field Staff
30. Deferred Maintenance Projected Costs as Percent of Revenue
31. Deferred Maintenance Projected Costs per 1,000 Square Feet
32. Green Buildings - Buildings Green Certified
33. Green Buildings - Buildings Green Certified Or Equivalent
34. Green Buildings - Buildings With Energy Star Certificate
35. Grounds Work - Cost Per Acre
36. Grounds Work - Cost Per Acre, Contractor-Operated



37. Grounds Work - Cost Per Acre, District-Operated
38. Grounds Work - Cost Per Student
39. Grounds Work - Proportion Contractor-Operated
40. Grounds Work - Staff Ratio - Field Workers Per Office Staff
41. Grounds Work - Staff Ratio - Non-Exempt Per Exempt Field Staff
42. M&O Staff - Field Staff As Percent Of All Staff
43. M&O Staff - Non-Exempt Workers As Percent Of Field Staff
44. Major Maintenance - Supervisors/Support Staff Costs As Percent Of Total Costs
45. Major Maintenance - Delivered Construction Costs As Percent Of Total Costs
46. Major Maintenance - Staff Ratio - Field Workers Per Office Staff
47. Major Maintenance - Staff Ratio - Non-Exempt Per Exempt Field Staff
48. New Construction - Delivered Construction Costs As Percent Of Total Costs
49. New Construction - Staff Ratio - Field Workers Per Office Staff
50. New Construction - Staff Ratio - Non-Exempt Per Exempt Field Staff
51. New Construction - Supervisors/Support Staff Costs As Percent Of Total Costs
52. Recycling - Percent Regulatory
53. Renovations - Delivered Construction Costs As Percent Of Total Costs
54. Renovations - Staff Ratio - Field Workers Per Office Staff
55. Renovations - Staff Ratio - Non-Exempt Per Exempt Field Staff
56. Renovations - Supervisors/Support Staff Costs As Percent Of Total Costs
57. Routine Maintenance - Cost Per Student
58. Routine Maintenance - Cost Per Work Order, Contractor-Operated
59. Routine Maintenance - Cost Per Work Order, District-Operated
60. Routine Maintenance - Proportion Contractor-Operated, By Work Orders
61. Routine Maintenance - Ratio Of Field Workers to Office Staff
62. Utility Costs - Electricity Cost Per Square Foot
63. Utility Costs - Heating Fuel Cost Per Square Foot
64. Utility Costs - Sewer Cost Per Square Foot
65. Utility Costs - Water Cost Per Square Foot
66. Utility Usage - Electricity Usage Per Square Foot (KWh)
67. Utility Usage - Heating Fuel Usage Per Square Foot (KBTU)
68. Utility Usage - Water (Non-Irrigation) Usage Per Square Foot (Gal.)
69. Utility Usage - Water Usage For Irrigation
70. Work Order Cancel/Void Rate
71. Work Order Completion Rate

## ATTACHMENT G. CGCS - PROCUREMENT KPIS

1. Competitive Procurements Ratio
2. Procurement Cost Per \$100K Spend
3. Procurement Cost Per Purchase Order
4. Procurement Savings Ratio
5. Strategic Sourcing Ratio
6. Cooperative Purchasing Ratio
7. P-Card Purchasing Ratio
8. PALT For Informal Solicitations
9. PALT For Invitations for Bids
10. PALT For Requests for Proposals
11. Procurement Staff With Professional Certificate
12. Warehouse Operating Expense Ratio
13. Warehouse Stock Turn Ratio
14. Competition-Eligible Procurements - Percent Emergency
15. Competition-Eligible Procurements - Percent Non-Authorized
16. Competition-Eligible Procurements - Percent Sole-Source
17. Competition-Eligible Procurements Percent Of Total Spending
18. Construction - Percent Of Purchasing
19. Cooperative Purchasing Ratio - Excluding P-Cards
20. M/WBE Vendor Utilization
21. P-Card Average Transaction Amount
22. P-Card Single Transaction Limit
23. PALT For Invitations for Bids - (A) Days to Prepare
24. PALT For Invitations for Bids - (B) Days of Advertising And Open Bidding
25. PALT For Invitations for Bids - (C) Days to Issue After Close
26. PALT For Requests for Proposals - (A) Days to Prepare
27. PALT For Requests for Proposals - (B) Days Proposals Accepted
28. PALT For Requests for Proposals - (C) Days to Issue After Close
29. Procurement Costs Per \$100K Revenue
30. Procurement Costs Ratio - Outsourced Services
31. Procurement Costs Ratio - Personnel
32. Procurement Savings - Percent Through Informal Solicitations
33. Procurement Savings - Percent Through Invitations For Bids
34. Procurement Savings - Percent Through Requests For Proposals
35. Procurement Staff - Cost Per FTE
36. Procurement Staff - District FTEs Per Procurement FTE

37. Procurement Staffing Ratio - Professional Staff
38. Procurement Staffing Ratio - Supervisors And Managers
39. Procurement Staffing Ratio - Support And Clerical
40. Threshold for Formal Proposal
41. Threshold for Formal Sealed Bid
42. Threshold for School Board Approval
43. Warehouse Number Of Unique Items
44. Warehouse Number Of Unique Items - Facility Maintenance
45. Warehouse Number Of Unique Items - Food Services
46. Warehouse Number Of Unique Items - School/Office Supplies
47. Warehouse Number Of Unique Items - Textbooks
48. Warehouse Number Of Unique Items - Transportation Maintenance
49. Warehouse Operating Expense Ratio - Facility Maintenance
50. Warehouse Operating Expense Ratio - Food Services
51. Warehouse Operating Expense Ratio - School/Office Supplies
52. Warehouse Operating Expense Ratio - Textbooks
53. Warehouse Operating Expense Ratio - Transportation Maintenance
54. Warehouse Stock Turn Ratio - Facility Maintenance
55. Warehouse Stock Turn Ratio - Food Services
56. Warehouse Stock Turn Ratio - School/Office Supplies
57. Warehouse Stock Turn Ratio - Textbooks
58. Warehouse Stock Turn Ratio - Transportation Maintenance

## ATTACHMENT H. CGCS - TRANSPORTATION KPIS

1. Bus Fleet - Average Age Of Fleet
2. Cost Per Mile Operated
3. Cost Per Rider
4. On-Time Performance
5. Accidents - Miles Between Accidents
6. Accidents - Miles Between Preventable Accidents
7. Bus Equipment - GPS Tracking
8. Bus Fleet - Alternatively-Fueled Buses
9. Bus Fleet - Daily Buses as Percent of Total Buses
10. Bus Fleet In Service Daily
11. Bus Usage - Daily Runs Per Bus
12. Cost Per Bus
13. Fuel Cost As Percent Of Retail - Diesel
14. Fuel Cost As Percent Of Retail - Gasoline
15. Personnel - Buses per Mechanic
16. Turn Time To Place New Students - General Education
17. Turn Time To Place New Students - SWD Students
18. Accidents - Miles Between Accidents (Contractor-Operated)
19. Accidents - Miles Between Accidents (District-Operated)
20. Accidents - Miles Between Preventable Accidents (Contractor-Operated)
21. Accidents - Miles Between Preventable Accidents (District-Operated)
22. Bus Equipment - AVL/GPS Links To Routing Software
23. Bus Equipment - Rider Harnesses, Lap
24. Bus Equipment - Rider Harnesses, Lap-And-Shoulder
25. Bus Equipment - Student Tracking Systems
26. Bus Equipment - Video Cameras
27. Bus Fleet - Maintenance Hours Per Bus
28. Bus Fleet - Percent Contractor-Operated
29. Bus Fleet - Percent District-Operated
30. Bus Inspections - Percent Passed On First Try
31. Bus Usage - Daily Seat Utilization
32. Bus Usage - Daily Seat Utilization (Contractor-Operated)
33. Bus Usage - Daily Seat Utilization (District-Operated)
34. Bus Usage - Live Miles Per Deadhead Mile
35. Bus Usage - Live Miles Per Deadhead Mile (Contractor-Operated)
36. Bus Usage - Live Miles Per Deadhead Mile (District-Operated)

37. Bus Usage - Miles Per Bus
38. Bus Usage - Miles Per Bus (Contractor-Operated)
39. Bus Usage - Miles Per Bus (District-Operated)
40. Contract Buses - Percent Of Ridership
41. Cost Per Bus (Contractor-Operated)
42. Cost Per Bus (District-Operated)
43. Cost per Rider (Yellow Bus Only)
44. Daily Ride Time - General Education
45. Daily Ride Time - SWD Students
46. Daily Ride Time, Maximum Allowed - General Education
47. Daily Ride Time, Maximum Allowed - SWD Students
48. Fuel Cost As Percent Of Retail - Bio-Diesel
49. Fuel Cost As Percent Of Retail - Compressed Natural Gas
50. Fuel Cost As Percent Of Retail - Propane
51. On-Time Performance (Contractor-Operated)
52. On-Time Performance (District-Operated)
53. Participation Rate - Alternative Transit
54. Participation Rate - Any Transportation Service
55. Participation Rate - Yellow Bus Service
56. Personnel - Driver Turnover Rate
57. Personnel - Drivers per Bus
58. Personnel - Drivers per Supervisor
59. Personnel - Drivers per Trainer
60. Personnel - Routes per Planner
61. Public Transit - Pass/Token Cost As Percent Of Retail
62. Public Transit - Percent Of Ridership
63. Students With Disabilities - Percent Of Ridership
64. Students With Disabilities - Students On Dedicated SWD Buses
65. Students With Disabilities - Students With Neighborhood Pickup

## ATTACHMENT I. COUNCIL REVIEWS

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	2004
	Communications	2008
	Math Instruction	2010
	Food Services	2011
	Organizational Structure	2012
	Facilities Operations	2015
	Special Education	2015
	Human Resources	2016
Atlanta	Facilities	2009
	Transportation	2010
	Classified Staffing	2019
	Teaching and Learning	2020
	Student Support Services	2021
Aurora	Information Technology	2019
Austin	Special Education	2010
Baltimore	Information Technology	2011
Birmingham		

City	Area	Year
	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
	Special Education	2022
	Safety and Security	2022
	Transportation	2022
Bridgeport	Transportation	2012
Broward County (FL)	Information Technology	2000
	Food Services	2009
	Transportation	2009
	Information Technology	2012
	Information Technology	2018
	Facilities Operations	2019
	Information Technology	2022
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)		

City	Area	Year
	Facilities	2004
Charleston	Special Education	2005
	Transportation	2014
	Finance	2019
Charlotte-Mecklenburg	Human Resources	2007
	Organizational Structure	2012
	Transportation	2013
	Information Technology	2022
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



City	Area	Year	
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	
Denver	Organizational Structure	2017	
	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	

City	Area	Year
	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
East Baton Rouge	Human Resources	2021
	Special Education	2022
	Bilingual Education	2022
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

City	Area	Year
Houston	Procurement	2005
	Special Education	2012
	Transportation	2015
Indianapolis	Facilities Operations	2010
	Capitol Program	2010
	Information Technology	2011
	Procurement	2011
	Finance	2021
Jackson (MS)	Transportation	2007
	Information Technology	2010
	Finance and Budget	2013
	Finance	2018
Jacksonville	Bond Referendum	2006
	Communications	2009
	Curriculum and Instruction	2017
Kansas City	Organization and Management	2002
	Operations	2002
	Human Resources	2002
	Finance	2002
	Information Technology	2002
	Finance	2006
	Facilities operations	2015
	Budget and finance	2015
	Human Resources	2005
Information Technology	2005	
Finance	2005	
Operations	2005	
Purchasing	2006	
Curriculum and Instruction	2006	
Program Implementation	2007	
Stimulus Planning	2009	

City	Area	Year
	Human Resources	2016
	Transportation	2016
	Finance	2016
	Facilities	2016
	Curriculum and Instruction	2016
	Information Technology	2022
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

City	Area	Year
Minneapolis	Alternative Education	2007
	Human Resources	2009
	Human Resources	2013
	Information Technology	2013
Nashville	Curriculum and Instruction	2004
	Finance	2004
	Federal Programs	2004
	Transportation	2016
	Organizational Structure	2016
Newark	Food Service	2010
	Bilingual Education	2014
	Curriculum and Instruction	2016
New Orleans	Curriculum and Instruction	2007
	Food Service	2008
New York City	Personnel	2001
	Transportation	2002
	Information Technology	2003
	Hurricane Damage Assessment	2005
	Curriculum and Instruction	2006
Norfolk	Special Education	2008
	Testing and Assessment	2003
	Curriculum and Instruction	2012
	Transportation	2018
	Finance	2018
Omaha	Facilities Operations	2018
	Buildings and Grounds Operations	2015
Orange County	Transportation	2016

City	Area	Year
Palm Beach County	Information Technology	2010
	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	2019
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

City	Area	Year
	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
	Human Resources	2022
	Operations	2022
Sacramento	Special Education	2016
San Antonio	Facilities Operations	2017
	IT Operations	2017
	Transportation	2017

City	Area	Year	
San Diego	Food Services	2017	
	Human Resource	2018	
	Finance	2006	
	Food Service	2006	
	Transportation	2007	
San Francisco	Procurement	2007	
	Technology	2001	
	Special Education	2003	
St. Louis	Curriculum and Instruction	2004	
	Federal Programs	2004	
	Textbook Procurement	2004	
	Human Resources	2005	
	Special Education	2011	
St. Paul	Transportation	2011	
	Organizational Structure	2017	
	Human Resources	2008	
Seattle	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
		Curriculum and Instruction	2005
	Toledo		
Washington, D.C.			



City	Area	Year
	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

**COO MEETING**



# Council of the Great City Schools

THE NATION'S VOICE FOR URBAN EDUCATION

**Chief Operating Officer and Directors of Supporting Services Conference**  
**November 8 – 11, 2022**  
**Royal Sonesta New Orleans**  
**300 Bourbon Street**  
**New Orleans, Louisiana 70130**

## AGENDA - DETAILED

Tuesday, November 8	
7:00am - 8:00am  <b><i>Fleur de Lis</i></b>	<b>Breakfast</b>
8:15am – 8:30am  <b><i>Grand Ballroom</i></b>	<b>Welcome</b> <i>Dr. Avis Williams, Superintendent, New Orleans Public Schools</i>  <b>Key Priorities and Overview of Agenda</b> <i>Willie Burroughs, Director of Management Services, Council of the Great City Schools (CGCS)</i>
8:30am – 9:15am  <b><i>Grand Ballroom</i></b>	<b>Diversity, Equity, and Inclusion: Presentations</b>  Moving from Our Equity Talk to Our Equity Walk <i>Ashford Hughes, Executive Officer for Diversity, Equity, and Inclusion, Metro Nashville Public Schools</i>  Learning objectives <ul style="list-style-type: none"> <li>- Identify and develop areas of understanding of educational equity essential to driving just outcomes for all students</li> <li>- Develop the awareness of how all systems (departments) within public education support the growth and development needs of children</li> <li>- Understand what an equity lens is and how it can be applied to learning spaces, departmental processes, and institutional decisions</li> </ul> Session description We are embarking upon our education equity journey together to increase the opportunities and access for each student within MNPS. Our goal is to impact student performance by applying culturally responsive processes and practices in teaching and learning every day to ensure each student is known and feels a sense of love and belonging.

Tuesday, November 8	
<p><i>Continued</i> 8:30am – 9:15am</p> <p><b>Grand Ballroom</b></p>	<p><b>Operationalizing Equity: Structural Change for Systemic Impact</b> <i>Kristen Howard, Esq., Senior Director of the Office of Health Equity and Inclusion at University of Michigan Medicine; former Chief of Staff, Detroit Public Schools Community District</i></p> <p>Learning objectives</p> <ul style="list-style-type: none"> <li>- Describe how organizational structure can have significant impact on a district's ability to create an inclusive environment</li> <li>- Explain why equity and inclusion are universal imperatives that must be imbedded in operational objectives</li> <li>- Identify potential gaps in policy that create barriers to inclusive environments</li> </ul> <p>Session description</p> <p>In many organizations, our diversity, equity, and inclusion journey focuses on interpersonal interactions – how each teacher, interventionist, or team member can affect the learning experience and classroom environment. Although this work is vitally important, systems can also benefit from an equity focus. This session will explore practical improvements realized in Detroit Public Schools Community District when equity and inclusion were at the forefront of policy adoption and built into the organizational structure.</p> <p><b>Women in Operational Leadership</b> <i>Dr. Gabriella Duran-Blakey, Chief Operating Officer, Albuquerque Public Schools</i> <i>Alishia Jolivette, Officer, Facilities, Maintenance, and Operations, Houston Independent School District</i></p> <p>Learning objectives</p> <ul style="list-style-type: none"> <li>- Understanding of women in operational leadership including challenges, successes, and opportunities to support women in your organization</li> </ul> <p>Session description</p> <p>This panel discussion will discuss keys to success for women as leaders in operations, including challenges and ways others can support women in your organization.</p>
<p>9:15am – 10:00am</p> <p><b>Grand Ballroom</b></p>	<p><b>Diversity, Equity, and Inclusion: Panel Discussion</b> <i>Facilitator: Machion Jackson, Assistant Superintendent of Operations, Detroit Public Schools Community District</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Participants will be introduced to the relevancy of DEI in district operational areas and will have a call to action to assess their organization's diversity, equity, and inclusion goals and programs. Participants will identify gaps to be addressed this school year.</li> </ul>

Tuesday, November 8	
	<p><b>Session Description</b>            Panelists will discuss the relevance of DEI frameworks in operations and will provide practical suggestions to move deeper in this work. Participants of districts without DEI goals will learn how to develop a strategy and those with DEI programs will explore how to measure progress and assess results. Key topics such as affinity bias, workforce/supplier diversity, and the removal of educational attainment barriers to employment will also be discussed.</p>
10:00am – 10:15am	<b>Break</b>
10:15am – 11:15am  <b>Grand Ballroom</b>	<p><b>Legislative Update from Washington</b>  <i>Manish Naik, Director of Legislative Services, CGCS</i>  <i>Moses Valle-Palacios, Manager of Legislative Services, CGCS</i></p> <p><b>Learning Objectives</b>            - Describe federal funding opportunities</p> <p><b>Session Description</b>            The legislative staff from the Council will share updates on federal action on education and funding opportunities for school districts in the recent Bipartisan Infrastructure Act (2021), the Bipartisan Safer Communities Act (2022), and the Inflation Reduction Act (2022).</p> <p><b>ESSER Spending in Tulsa Public Schools</b>  <i>Jorge Robles, Chief Financial and Operating Officer, Tulsa Public Schools</i></p> <p><b>Learning Objective</b>            - Understand and learn about the efforts and strategies used by an urban public school district to invest ESSER dollars and avoid a funding cliff</p> <p><b>Session Description</b>            Tulsa Public Schools has been focused on work to ensure successful investment of ESSER dollars to improve student outcomes, and on avoiding a funding cliff once stimulus dollars expire. In Tulsa, our total stimulus allocation across all 3 programs is \$205M - almost 5.5 times a single year of ALL federal funding combined to be spent in 2-3 years. In this presentation we will discuss ways in which your district can think about investing stimulus dollars effectively while avoiding a funding cliff.</p>

Tuesday, November 8	
<p>11:15am – 12:00pm</p>	<p><b>Managing for Results – Understanding the Operations’ Key Performance Indicators (KPIs) Process and the Strategic Use of KPI Data</b>  <i>Dr. Akisha Osei Sarfo, Director of Research, CGCS</i>  <i>Eric Vignola, Manager of Software Engineering, CGCS</i>  <i>Brian Garcia, Research Manager, CGCS</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Understand the KPI data collection process and best practices in utilizing KPI data in district strategic planning and decision making.</li> </ul> <p>Session Description</p> <p>CGCS staff will provide a walkthrough of the data collection process for the operational KPI reports. Staff will also discuss ways in which to use KPI data in district decision making. Following this presentation, two district staff members will provide specific examples of their use of operational KPI data in their districts.</p> <p><b>District Presentations on Using KPI Data</b>  <i>Nathan Graf, Senior Executive Director of Transportation, San Antonio Independent School District</i>  <i>Aaron Walter, Executive Director of Transportation, Detroit Public Schools Community District</i></p>
<p>12:00pm - 12:45pm</p> <p><b><i>Fleur de Lis</i></b></p>	<p><b>Lunch</b></p>
<p>1:00pm – 1:20pm</p> <p><b><i>Grand Ballroom</i></b></p>	<p><b>Introducing New CGCS Apps for Collaborating with Peers</b>  <i>Eric Vignola, Manager of Software Engineering, CGCS</i></p> <p>Learning objectives</p> <ul style="list-style-type: none"> <li>- Introduce new tools for job-alike groups to communicate with each other</li> <li>- Get audience feedback on the direction of the tool and potential features the membership would like to see</li> </ul> <p>Session Description</p> <p>The Council is excited to give a sneak peek of the new collaboration tools we’ve been developing for our members. We’ve been building these tools specifically with your needs in mind. These technology enhancements will make it easier to connect with peers, find resources relevant to your work, track upcoming Council events, and much more.</p>

**Tuesday, November 8**

1:25pm - 2:10pm

**Grand Ballroom**

**Facility Optimization Model for Declining Enrollments**

*Tiffany Delcour, Chief Operating Officer, New Orleans Public Schools*

Learning Objectives

- Discuss ideal options and pathways available to school districts to turn unneeded school facilities into community benefit assets
- Understand the demographic and capital planning data needed to create a property strategy when experiencing lower student enrollments

Session Description

Most urban school districts are experiencing a drop in student enrollment due to declining birth rates. This will require most urban school districts to reevaluate their school facility portfolio to right size their school system. This must be done with a strategy that involves communities to ensure these school facilities do not become blighted properties that devalue communities but are used to support and provide community needs.

**San Antonio ISD Master Plan 2030: A Modern Approach to a Historic District**

*Kedrick Wright, Deputy Chief Operations Officer, San Antonio Independent School District*

Learning Objective

- Understand how to set goals for a Facilities Master Plan in a historic urban school district with evolving educational models and pedagogy
- Understand how the theory of form follows function will ensure the built environment supports the whole student and the communities in which they live and learn

Session Description

San Antonio ISD's Master Plan 2030 was a planning and assessment process that proactively established a vision for facilities that respond to curriculum, pedagogy, and community in support of Learner Centered Environments. The planning process was a forward looking and inclusive exercise – proactive instead of reactive – examining existing facilities, curriculum, pedagogy, and community history. The result maximizes public investment in the present and future of learning as defined by SAISD. School buildings that can endure for 75 years or more. Maximizing these public investments by careful planning and commitment to a proactive and inclusive process.

Tuesday, November 8	
<p><i>Continued</i> 1:25pm - 2:10pm</p> <p><b>Grand Ballroom</b></p>	<p><b>Reducing Poverty Without Community Displacement</b> <i>Rhett Morris, Partner, Common Good Labs</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Understanding the eight indicators of inclusive prosperity for strategic planning</li> </ul> <p>Session description</p> <p>The presentation will cover new <u>research</u> by Common Good Labs partners Rhett Morris and Rohit Acharya published by the Brookings Institute this fall. The research identifies eight indicators of what the authors describe as “inclusive prosperity,” or the capacity for communities to move out of concentrated poverty without displacing residents. This presentation seeks to empower district leaders with the knowledge and insights into how to work with their local civic and political leaders to create strategic plans for their schools that can be a part of a broader plan to improve economic and social outcomes for all resident stakeholders.</p>
<p>2:10pm - 2:55pm</p> <p><b>Grand Ballroom</b></p>	<p><b>Reconfigure, Repurpose and Reimagine – Making the Most of Your Assets: Panel Discussion</b> <i>Debra Guerrero, former trustee, San Antonio Independent School District Board; Vice President of NRP Group</i></p> <p>Learning objectives</p> <ul style="list-style-type: none"> <li>- Taking inventory of assets – what is still needed</li> <li>- Developing a strategic plan</li> <li>- Excess land? Too much parking? How can it benefit your district?</li> <li>- Consolidation as changing growth and population trends change your needs</li> <li>- Exploring public/private partnerships and opportunities to collaborate with other local entries.</li> <li>- Linking repositioning of real estate assets with metrics for educational excellence</li> </ul> <p>Session description</p> <p>The panel discussion will include examples from school districts repositioning and converting its buildings to meet district priorities. District priorities ranged from new facilities for programs, creating affordable housing for teachers, school staff and families of students, and creating new sources of revenue. This initiative is also in response to the declining enrollment in urban school districts and the desire to create efficiencies in buildings district wide.</p>
<p>3:00pm - 4:45pm</p>	<p><b>Breakout Sessions by Functional Area</b></p>



**Tuesday, November 8**

<p><b>Grand Ballroom</b></p> <p>3:00pm - 3:45pm</p>         <p>4:00pm – 4:45pm</p>	<p><b>Chief Operating Officers</b></p> <p>Knowing What You Didn't Know <i>Facilitator: Brian Schultz, Chief Operating Officer, Charlotte-Mecklenburg Schools</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"><li>- Provide new COOs with helpful lessons learned from veteran COOs</li></ul> <p>Session Description</p> <p>Many new COOs have started since the last convening of Operations leaders. While the focus will be passing along wisdom to the rookies in the bunch, everyone will learn from the panel topics during this time of enrichment and sharing.</p> <p>Cybersecurity in our Great City Schools <i>Tom Ryan, Ph.D., K-12 Strategic Technology Advisory Group, Retired CIO, Albuquerque Public Schools</i> <i>Shahryar Khazei, Retired CIO, Los Angeles Unified School District</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"><li>- Understand why cybersecurity is important for district leaders</li><li>- Identify strategies to make cybersecurity an enterprise responsibility</li><li>- Identify evidence district leaders should know regarding their preparedness related to cybersecurity</li></ul> <p>Session Description</p> <p>School districts across the country are under attack from cyber criminals using DDoS attacks (Distributed Denial of Service), ransomware, phishing campaigns and Social Engineering. Cybersecurity is an enterprise-wide challenge, yet it is often assumed to be an Information Technology responsibility.</p>
<p><b>Evangeline – B-C</b></p> <p>3:00pm - 3:45pm</p>	<p><b>Facilities and Plant Operations</b></p> <p>Illuminate Greatness: Creating Standards of Excellence and High Performance in Facilities Operations <i>Ron Hickey, Assistant Superintendent, Facilities Support Services, Sacramento City Unified School District</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"><li>- Discuss methods and techniques that lead to creating job performance standards that elevate work productivity to maximum levels</li><li>- Provide school districts with tools that create standards of excellence in everything done by your facilities operations team</li></ul>

Tuesday, November 8	
4:00pm – 4:45pm	<p><b>Session Description</b> This is an interactive session between the moderator and the audience that shows how employee work performance can be elevated from levels of mediocrity to standards of excellence and high performance, while developing high performing work teams. The conversation will be centered around job performance improvement, maximizing productivity, and standardizing and sustaining excellence as a work culture.</p> <p><b>Continuous Improvement Through LEAN Methodologies</b> <i>Facilitator: Chris Salley, Senior Executive Director of Facilities Services, San Antonio School District</i></p> <p><b>Learning Objectives</b></p> <ul style="list-style-type: none"> <li>- Discuss LEAN management/manufacturing principles and how they can be used in a K-12 environment</li> <li>- Provide school districts with tools that allow them to reach “low hanging fruit” using Kaizen, Poke Yoke, and 5S.</li> </ul> <p><b>Session Description</b> This is an interactive session between the moderator and the audience that shows how private industry best practices can be implemented in a K-12 environment. The conversation will be centered around continuous improvement, mistake proofing, and standardizing and sustaining productivity gains.</p>
<b>Evangeline – A</b> 3:00pm - 3:45pm	<p><b>Transportation</b></p> <p>Welcome, Introductions, and Agenda <i>Facilitators:</i> <i>Jim Beekman, General Manager of Transportation, Hillsborough County Public Schools</i> <i>Nathan Graf, Senior Executive Director of Transportation, San Antonio Independent School District</i></p> <p><b>Learning Objective</b></p> <ul style="list-style-type: none"> <li>- Orientation to prepare for the conference</li> </ul> <p><b>Session Description</b> Each person will introduce themselves, share how they got started in school bus transportation, and what they hope to gain from the conference.</p>
4:00pm – 4:45pm	<p><b>Roundtable on 22-23 School Startup</b> <i>Nathan Graf, Senior Executive Director of Transportation, San Antonio Independent School District</i></p> <p><b>Learning Objective</b></p> <ul style="list-style-type: none"> <li>- Lessons learned, what went well and not so well</li> </ul>

Tuesday, November 8	
	<p><b>Session Description</b>            With the lingering impact of COVID and a nationwide school bus driver shortage, shortages of parts and supplies for school buses, and rising fuel costs how are school district transportation departments managing these challenges.</p>
<p><b>Regal Suite</b>             3:00pm - 3:45pm</p>	<p><b>Safety and Security</b></p> <p>Welcome, Introductions, and Agenda  <i>Facilitators:</i>  <i>Jason Matlock, Director, Emergency Management, Safety, and Security, Minneapolis Public Schools</i>  <i>Mike Eaton, Chief, Department of Climate and Safety, Denver Public Schools</i></p> <p><b>Learning Objective</b>            - Orientation and establishing of connections</p> <p><b>Session Description</b>            Your planning team will help make sure you are ready for a productive conference</p>
<p>4:00pm – 4:45pm</p>	<p><b>CGCS/IACP Blueprint Workshop</b>  <i>Facilitator: Jason Matlock, Director, Emergency Management, Safety, and Security, Minneapolis Public Schools</i></p> <p><b>Learning Objectives</b>            - Understand the document            - Identify areas of improvement</p> <p><b>Session Description</b>            The group will review the document that was created in a joint venture between CGCS and IACP to ensure areas identified by subject matter experts are covered well</p>
<p><b>Royal Conti</b>             3:00pm - 3:45pm</p>	<p><b>Food Services</b>  <b><i>(Closed Session: School District Staff Only)</i></b></p> <p>Federal Update for Food Services  <i>Manish Naik, Director of Legislative Services, CGCS</i>  <i>Moses Valle-Palacios, Manager of Legislative Services, CGCS</i></p> <p><b>Learning Objectives</b>            - Updates provided will assist with navigating current programs and prepare for the 2023-2024 school year            - Major topics of discussion may include program funding, Meal pattern changes, and PEBT funding</p>

Tuesday, November 8	
4:00pm – 4:45pm	<p>Session Description Federal programming updates that include the latest USDA policy revisions and the impact on Food Service programs.</p> <p>Roundtable Discussion on 2022-2023 Startup Issues: Supply Chain, Food Quality, and Staffing <i>Facilitator: Jenny Arredondo, Senior Executive Director of Child Nutrition Services, San Antonio Independent School District</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Develop best practices, and strategies to assist with current issues</li> <li>- Share lessons learned</li> <li>- Establish a network</li> <li>- Look ahead to the 2023-2024 school year</li> </ul> <p>Session Description As a result of the pandemic Child Nutrition programs have experienced persistent issues that have created daily challenges. Participants will be able to share experiences and best practices to help navigate successful meal programs.</p>
5:00pm - 6:30pm  <b><i>Fleur de Lis and Courtyard</i></b>	<p><b>Welcome to New Orleans Gala Reception and Awards Ceremony</b></p> <p>Distinguished Awards Presentation</p>

<b>Wednesday, November 9</b>	
7:00am - 7:45am <i>Fleur de Lis</i>	<b>Breakfast</b>
8:00am – 12:00pm	<b>Breakout Sessions by Functional Area</b>
<b>COO + Facilities and Plant Operations Joint Session</b>	
8:00am - 8:45am <b>Grand Ballroom</b>	<p><b>Trusted Indoor Spaces</b>  <i>Chris E. Salley, Sr. Executive Director of Facilities Services, San Antonio ISD</i>  <i>Michael Jackson, Sr., National Field Director, Active Pure Technology</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Efficacy with SARS-Cov-2, Flu, Mold and other surface and airborne contaminants and triggers</li> <li>- Increase Average Daily Attendance (ADA)</li> <li>- Reduce District Maintenance and Operation cost</li> </ul> <p>Session Description</p> <p>This session will discuss the challenges of addressing COVID-19 in a budget-restrained environment. SAISD will explain what their challenges were and how they went through the vetting process to settle on the ActivePure solution. They will also explain how they use the technology to reduce operating costs for the custodial department and the methods used to validate the efficacy of the technology.</p>
9:00am - 9:45am <b>Grand Ballroom</b>	<p><b>Improve Student Outcomes Through Modernization of Building Technology</b>  <i>Dr. Gabriella Blakey, Chief Operations Officer, Albuquerque Public Schools</i>  <i>Ken Gilbert, Business Development Manager, Automated Logic Controls</i>  <i>Phillip Cockerham, Regional Sales Manager, Automated Logic Controls</i>  <i>Matt Robeson, National Accounts Manager, Carrier Corporation</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Improve student performance and reduce absenteeism by monitoring and controlling the buildings health and optimizing Indoor Air Quality</li> </ul>

Wednesday, November 9	
	<ul style="list-style-type: none"> <li>- Allow remote monitoring capabilities and enable other strategies to efficiently utilize staff resources</li> <li>- Reduce energy costs and support sustainability goals</li> </ul> <p>Session Description</p> <p>In this session, you will learn about the latest building technology solutions that provide critical information to make data-driven decisions that create healthier, safer, more intelligent, and sustainable learning environments that improve the performance outcomes of students and staff.</p>
<p>10:00am - 10:45am</p> <p><b>Grand Ballroom</b></p>	<p><b>Moving Past Deferred Maintenance: How Guilford County Schools Went From \$800M in Backlog Projects to &gt;\$2B in Funding to Rebuild Our Community's Schools</b></p> <p><i>John Simmons, Senior Executive Director of Facilities and Maintenance, Guilford County Schools</i>  <i>David Sturtz, Executive Director of Development, Cooperative Strategies</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Creating and mobilizing support for an ambitious facilities plan</li> </ul> <p>Session Description</p> <p>A 2018 FCA revealed over \$800 in deferred maintenance. The district created an ambitious plan to rebuild their aging portfolio of schools to support their vision for modern programming. The vision caught on with the community, influenced local elections, and rallied support for the passing of two bonds totaling \$2B to realize this vision.</p>
<p>11:00am - 11:45am</p> <p><b>Grand Ballroom</b></p>	<p><b>Audio Enhancement's District-Wide Integrated System: Lessons Learned</b></p> <p><i>Christopher Farkas, Chief Operating Officer, Hillsborough County Public Schools</i>  <i>Joseph Sanches, Chief Operating Officer, School District of Palm Beach County</i>  <i>Chris Perkins, Chief Operating Officer, Jefferson County Public Schools</i>  <i>Tanner Anderson, Regional Sales Director, Audio Enhancement</i>  <i>Tom Dobson, Senior Vice President, Audio Enhancement</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Discuss lessons learned from integrating technology</li> </ul>

Wednesday, November 9	
	<p>designed to increase academic achievement and school safety and communication systems</p> <p><b>Session Description</b>  This presentation will highlight Audio Enhancement's 4 integrated solutions and how they can help schools streamline the constant challenge of effective, timely, and equitable communication. The 4 solutions include classroom Audio System, SAFE emergency distress system, EPIC intercom system, and VIEWpath classroom camera system. Audio Enhancement offers solutions that simplify and streamline communication campus and district-wide, with everything grounded in the original passion of helping students learn better. We will discuss lessons learned in Hillsborough County and Jefferson County as they implemented these solutions and how the system impacted student achievement and school safety.</p>
<b>Transportation</b>	
<p>8:00am - 8:45am</p> <p><b><i>Evangeline – A</i></b></p>	<p><b>Review of Transportation KPI Metrics</b>  <i>Dr. Akisha Osei Sarfo, Director of Research, CGCS</i>  <i>Eric Vignola, Manager of Software Engineering, CGCS</i>  <i>Brian Garcia, Research Manager, CGCS</i></p> <p><b>Learning Objective</b>  - Review of KPI metrics for understanding, updates, and clarifying language</p> <p><b>Session description</b>  Members of the Council of the Great City Schools will lead discussions reviewing transportation KPIs, potential revisions to the KPIs, and clarifying language that should be added to the data collection system.</p>
<p>9:00am - 9:45am</p> <p><b><i>Evangeline – A</i></b></p>	<p><b>Modernizing School Transportation by Addressing the Utilization Problem</b>  <i>Jim Beekman, General Manager of Transportation, Hillsborough County Public Schools</i>  <i>David Solik-Fifarek, Senior Director Business and Transportation Services, Milwaukee Public Schools</i>  <i>Toby McGraw, Senior Vice President, HopSkipDrive</i></p> <p><b>Learning Objectives</b>  - Present data and trends showing the need to</p>

Wednesday, November 9	
	<p>modernize student transportation</p> <ul style="list-style-type: none"> <li>- Strategies for districts to solve for bus driver shortages through determining and assessing ineffective utilization</li> </ul> <p>Session description</p> <p>In this session, we will present data and strategies for how districts can do the following:</p> <ul style="list-style-type: none"> <li>- Utilize software that assesses and determines inefficient bus routes and recommends the right vehicle for each route (and each stop), whether that's a bus, an SUV or a sedan;</li> <li>- Match rides to actual ridership;</li> <li>- Decrease students' commute times, reducing chronic absenteeism and tardiness, and improving educational outcomes; and</li> <li>- Fulfill individualized transportation needs.</li> </ul>
<p>10:00am - 10:45am</p> <p><b><i>Evangeline – A</i></b></p>	<p><b>How your Team Dynamic &amp; Collaboration can Facilitate Change in the Department</b></p> <p><i>Jacinta Hughes, Staff Specialist, Baltimore City Public Schools (BCPS)</i></p> <p><i>Sharicca Boldon, Interim Director of Strategy and Compliance, Operations, BCPS</i></p> <p><i>Dr. Lynette Washington, Chief Operating Officer, BCPS</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Understand how City Schools handled the bus driver shortage and what alternative transportation options were used</li> <li>- Discuss the process of changing bell times, who to involve in the decision, and how it positively impacted the district's ability to transport students during a driver shortage</li> </ul> <p>Session description</p> <p>Transporting Students during a Bus Driver Crisis. This workshop will be a conversation around how the Operations team at Baltimore City Public Schools were able to transport students during a driver shortage using continuous improvement strategies that led to effective practices and significant results.</p>
<p>11:00am - 11:45am</p> <p><b><i>Evangeline – A</i></b></p>	<p><b>Prep for COO Afternoon Session</b></p> <p><i>Facilitators: Jim Beekman and Nathan Graf</i></p> <p>Learning objectives</p>



Wednesday, November 9

- Discuss critical challenges and barriers within school bus transportation and solutions to overcome.

Session description

Many people say “oh, it’s just transportation, how hard can it be?” Those in the industry know the real answer to this question! In this session we will discuss challenges and barriers impacting both efficiencies and effectiveness within transportation along with solutions to present to the COOs.

**Safety and Security**

8:15am - 9:00am

**Regal Suite**

**Safer Schools with Evolv Technology: Helping Your District Create a More Secure Learning Experience for Students and Teachers**

*Brian Schultz, Chief Operating Officer, Charlotte-Mecklenburg Schools*

*Neil Sandoff, Vice President, Head of Education, Evolv Technology*

Learning Objectives

- Hear “lessons learned” from a panel of education and technology experts
- Gather information about the latest safety practices currently implemented at CGCS districts
- Prepare to take the next step in creating a safer learning environment at your school

Session description

The threat of violence in U.S. schools districts increases at an uncomfortable rate every year, as does the need for tightened security measures. This creates an environment for teachers, students, and other faculty in and out of the classroom daily that is looming, affecting every aspect of the teaching and learning experience. Join a conversation between safety and education professionals, discussing the physical and emotional impact teachers and students face. You’ll learn about replicable security protocols to create a more secure and peaceful learning experience in your school.

**Wednesday, November 9**

9:00am - 9:45am

**Regal Suite**

**Review of Safety and Security KPI Metrics**

*Dr. Akisha Osei Sarfo, Director of Research, CGCS  
Eric Vignola, Manager of Software Engineering, CGCS  
Brian Garcia, Research Manager, CGCS*

Learning Objective

- Review of KPI metrics for understanding, updates, and clarifying language

Session Description

Members of the Council of the Great City Schools will lead discussions reviewing transportation KPIs, potential revisions to the KPIs, and clarifying language that should be added to the data collection system.

10:00am - 10:45am

**Regal Suite**

**Effective Approach to Threat Assessment through Case Management**

*Jason Matlock, Director, Emergency Management, Safety, and Security, Minneapolis Public Schools  
Bill Reynolds, Business Development, Public Consulting Group  
Jillian Haring, Senior Advisor, Public Consulting Group*

Learning Objectives

- Describe and differentiate among various threat assessment models
- Understand the attributes of these models and how case management promotes fidelity and accurate reporting

Session Description

Learn why a behavior threat assessment (BTA) process is especially needed in large districts. We will provide a look at the process for setting up case management systems, why they chose their threat assessment model or protocol and how they selected their own BTA case management platform. This session will provide an overview of what each of the 3 most-common models and hybrid look like when implemented into a successful threat assessment triage and case management context.

Wednesday, November 9	
<p>11:00am - 11:45am</p> <p><b>Regal Suite</b></p>	<p><b>Keeping Our Students Safe, Healthy, and Happy</b>  <i>Chief Thomas Y. Trawick, Jr. (Ret.), former Chief of Safety and Security, Clayton County, GA.</i>  <i>Jason Matlock, Director of Emergency Management, Safety, and Security, Minneapolis Public Schools</i>  <i>Jeff Patterson, Chief Executive Officer, Gaggle</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Gain insights into the mental health challenges facing students and how those issues manifest themselves in threats to physical safety</li> <li>- Learn ways to identify students who are being bullied, are depressed, suicidal or planning violence towards others,</li> <li>- Review programs for student intervention and postvention and learn techniques for dealing with administrative and media challenges when doing this important work</li> </ul> <p>Session Description</p> <p>Hear from an interactive panel of district leaders as they discuss the key components of student and school safety, and their solutions for prevention, postvention, and student support.</p>
<b>Food Services</b>	
<p>8:15am - 9:00am</p> <p><b>Royal Conti</b></p>	<p><b>Before and After the Storm</b>  <i>Nadine Mann, Child Nutrition Program, Chief Financial Director, East Baton Rouge Parish School System</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Review sample disaster plan</li> <li>- Understand proactive elements of a disaster plan</li> </ul> <p>Session Description</p> <p>The presenter will share a disaster plan put in place by the East Baton Rouge Parish School System. Participants will be able to engage with the presenter on the necessary steps in the development of a plan.</p>
<p>10:00am - 10:45am</p> <p><b>Royal Conti</b></p>	<p><b>Review of Food Service KPI Metrics</b>  <i>Dr. Akisha Osei Sarfo, Director of Research, CGCS</i>  <i>Eric Vignola, Manager of Software Engineering, CGCS</i></p>

Wednesday, November 9	
	<p><i>Brian Garcia, Research Manager, CGCS</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Review of KPI metrics for understanding, updates and clarifying language</li> </ul> <p>Session Description</p> <p>Members of the Council of the Great City Schools will lead discussions reviewing transportation KPIs, potential revisions to the KPIs, and clarifying language that should be added to the data collection system.</p>
<p>9:00am - 9:45am</p> <p><b>Royal Conti</b></p>	<p><b>Point of Sale Systems (<i>Closed Session: School District Staff Only</i>)</b></p> <p><i>Joe Brown, Director, Columbus City Schools</i></p> <p>Learning objectives</p> <ul style="list-style-type: none"> <li>- Identify available software options</li> <li>- Identify program needs</li> <li>- Clarify different components and benefits (i.e. back of the house)</li> <li>- Understand what support is needed</li> <li>- Clarify procurement processes</li> </ul> <p>Session description:</p> <p>Review and discuss options for district Food Service programs Point of Sale Systems (POS). It is crucial to find a POS that meets the needs of the district's meal programs. In addition to compliance requirements, it is important to understand the reporting capabilities of the program utilized. It is critical to review and establish a training program and strategic roll-out to meet the needs of staff. Coordinating the implementation with the district's technology department is also essential.</p>
<p>11:00am - 11:45am</p> <p><b>Royal Conti</b></p>	<p><b>Factors Impacting Meal Participation – Pre-Pandemic vs. Current (<i>Closed Session: School District Staff Only</i>)</b></p> <p><i>Jenny Arredondo, Senior Executive Director of Child Nutrition Services, San Antonio Independent School District</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Establish best practices</li> <li>- Develop strategies to address meal participation via: Campus Administration; Student promotions; and Meal model strategies</li> </ul>

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	<p>Session Description</p> <p>Meal participation is crucial to the success of Child Nutrition programs. During this session different factors that impact meal participation will be discussed. Participants will be able to share district experiences and best practices. Decreased participation during school closures also had a negative impact on department budgets. What have districts done to overcome this?</p>
<p>12:00pm - 1:00pm</p> <p><b><i>Fleur de Lis</i></b></p>	<p>Lunch</p>
<p>1:15pm - 2:15pm</p> <p><b><i>Room TBD</i></b></p>	<p><b>KPI Office Hours</b>  <i>CGCS Research Staff</i></p> <p><i>Stop by for any district-specific questions related to your operational KPIs.</i></p>
<p>1:15pm - 5:00pm</p>	<p><b>Breakout Sessions by Functional Area</b></p>
<p><b>COO + Transportation Joint Session</b></p>	
<p>1:15pm - 2:00pm</p> <p><b><i>Grand Ballroom</i></b></p>	<p><b>The Call Center Revolution: How One District is Bringing Their Transportation Communications Into the 21st Century</b>  <i>John Wilcots, Transportation Services General Manager, Houston Independent School District</i>  <i>Krista Coleman, Chief Customer Officer, K12 Insight</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Develop simplified workflows that save staff time</li> <li>- Use effective and strategic communication as a competitive advantage to ensure information is accessible</li> <li>- Empower internal teams to provide superior customer service to external stakeholders</li> </ul> <p>Session description</p> <p>School districts depend on transportation services — and streamlining inquiries from the community can have a powerful impact on parent satisfaction and internal communications workflows. John Wilcots, General Manager of Transportation Services, will share how Houston Independent School District has</p>

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	<p>used Let's Talk to revolutionize their transportation call center. Leveraging Let's Talk's unified inbox and automation, the district manages up to 3,000 inbound dialogues a month — saving time, ensuring families have access to the information they need, and improving the customer experience.</p>
<p>2:15pm - 3:00pm</p> <p><b>Grand Ballroom</b></p>	<p><b>The Power of Planning &amp; Technology to Build Adaptive, Modern School Transportation Systems: Lessons Learned</b>  <i>Mathew Palmer, Executive Director of School Planning and Operational Services, Durham Public Schools</i>  <i>Derek Graham, Independent Contractor Consultant, Education Logistics, Inc. (Edulog)</i>  <i>Andy Leibenguth, Senior Consultant, Edulog</i>  <i>Spencer Jenko, Optimization Consultant, Edulog</i></p> <p>Learning Objective  - Identify ways to modernize transportation operations</p> <p>Session Description  COVID-19 induced numerous near- and long-term challenges for urban school systems providing transportation support to students and families. Among these, ongoing and unprecedented driver shortages force urban school systems to do more with less. Yet, these times have also re-enforced the understanding that every seat on the bus is precious and not to be taken for granted. Coming through the COVID-19 Pandemic, Durham Public Schools sought to slingshot innovation and advancements in transportation service for students / families (shorter ride times, more consistency, improved communication) while advancing efficiency (using fewer drivers and increasing utilization).</p>
<p>3:15pm - 4:00pm</p> <p><b>Grand Ballroom</b></p>	<p><b>Challenges Facing Transportation &amp; Strategies to Overcome</b>  <i>Facilitators:</i>  <i>Jim Beekman, General Manager of Transportation, Hillsborough County Public Schools</i>  <i>Nathan Graf, Senior Executive Director of Transportation,</i></p>

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	<p><i>San Antonio Independent School District</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"><li>- To understand the challenges facing school bus transportation nationwide and strategies to overcome.</li></ul> <p>Session Description</p> <p>COVID has had an impact nationwide on school transportation departments. This includes widespread driver shortages, delays in school bus parts, and high fuel prices. These factors will be discussed along with successful strategies that some districts have implemented to overcome these challenges.</p>
<p>4:15pm - 5:00pm</p> <p><b>Grand Ballroom</b></p>	<p><b>Succession Planning</b></p> <p><i>Facilitators:</i> <i>Jim Beekman, General Manager of Transportation, Hillsborough County Public Schools</i> <i>Nathan Graf, Senior Executive Director of Transportation, San Antonio Independent School District</i></p> <p>Learning objective</p> <ul style="list-style-type: none"><li>- Explain how succession planning works in school transportation</li></ul> <p>Session description</p> <p>With the “Great Resignation” school transportation departments nationwide have lost in-house talent. Strategies will be discussed on how to train and build up internal talent to quickly fill the void when transportation team members leave the department.</p>
<p><b>Facilities and Plant Operations</b></p>	
<p>1:15pm - 2:00pm</p> <p><b>Evangeline – B/C</b></p>	<p><b>Learn How Philadelphia Is Unlocking Energy Savings Opportunities to Improve Facilities</b></p> <p><i>Reggie McNeil, Chief Operating Officer, School District of Philadelphia</i> <i>Kendra McQuilton, Chief Executive Officer, Energia</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"><li>- Leverage energy-efficiency upgrades from the savings generated by the work and/or increase their funding capacity and ability to accomplish more projects</li><li>- Understand that energy-savings programs can support many district goals</li></ul>

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	<ul style="list-style-type: none"> <li>- Understand the two different Energy Performance Contract structure models and how each one affects district operations</li> <li>- Learn how Philadelphia leverages an independent owner's representative at no out-of-pocket cost or risk</li> </ul> <p>Session Description Utility costs are rising. Budgets are getting squeezed and operations departments are often tapped to find solutions while trying to balance building priorities (such as equity, safety, equipment failure, etc.) with urgent facilities' needs. An Energy Performance Contract (EPC) can be a solution to many of these challenges. As a self-funded project that mitigates the rising cost of energy, a well-structured EPC can provide added capital funding, balance building priorities, and even provide community upside. The School District of Philadelphia embarked on a multi-phased EPC (Pennsylvania's Guaranteed Energy Savings Act) accomplishing school district goals that went well beyond the financial benefit.</p>
<p>2:15pm - 3:00pm</p> <p><b><i>Evangeline – B/C</i></b></p>	<p><b>Review of Facilities and Plant Operations KPI Metrics</b> <i>Dr. Akisha Osei Sarfo, Director of Research, CGCS</i> <i>Eric Vignola, Manager of Software Engineering, CGCS</i> <i>Brian Garcia, Research Manager, CGCS</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Review of KPI metrics for understanding, updates, and clarifying language</li> </ul> <p>Session Description Members of the Council of the Great City Schools will lead discussions reviewing transportation KPIs, potential revisions to the KPIs, and clarifying language that should be added to the data collection system.</p>
<p>3:15pm - 4:00pm</p> <p><b><i>Evangeline – B/C</i></b></p>	<p><b>Data-Based Facility Management and Decision-Making</b> <i>John Dufay, Executive Director, Support, Maintenance, and Operations, Albuquerque Public Schools</i> <i>Steve Kiziuk, Chief Executive Officer, Mountain Vector Energy</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Learn to use facility data to enhance building and</li> </ul>



<b>Wednesday, November 9</b>	
	<p>enterprise operations.</p> <p><b>Session Description</b>  In the context of energy and water conservation, the available data and information on maintenance and asset performance has historically been disparate. The complexity increases with the rapid adoption of new building assets like solar, batteries and electric vehicle charging stations. Together, we plan to work through live examples where Albuquerque Public Schools is integrating data streams to enhance the performance of their buildings in Maintenance &amp; Operations and how this may benefit the Council of the Great City Schools.</p>
<p>4:15pm - 5:00pm</p> <p><b>Evangeline – B/C</b></p>	<p><b>Right-Sizing District from Conception to Design</b>  <i>Machion Jackson, Assistant Superintendent Operations, Detroit Public Schools Community District</i>  <i>Nicole Blocker, Vice President, Plante Moran Cresa</i>  <i>Paul Wills, Partner, Plante Moran Cresa</i>  <i>Greg VanKirk, Partner, Plante Moran Cresa</i></p> <p><b>Learning Objective</b></p> <ul style="list-style-type: none"> <li>- Understand the master plan implementation process</li> <li>- Identify development strategies to remain on budget and within scope</li> </ul> <p><b>Session Description</b>  Participants will engage with presenters on key elements of the master plan development/refinement progress: pre-planning/fact finding, planning, and implementation. While enrollment trends, facility utilization, demographics, and real estate opportunities are necessary factual components of any plan, this session will explore practical considerations for building use because of fluctuating enrollment. Special emphasis will be placed on spacing planning, budget development, and scheduling during today's challenging construction market.</p>
<b>Safety and Security</b>	
<p>1:15pm - 2:30pm</p> <p><b>Regal Suite</b></p>	<p><b>Restorative Justice Approaches</b>  <i>Tara Shelton, School Climate Coordinator, Atlanta Public Schools</i></p> <p><b>Learning Objective</b></p>

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	<ul style="list-style-type: none"> <li>- Identify best practices around restorative justice approaches that have impacted the school to prison pipeline</li> </ul> <p>Session Description</p> <p>This session will give leaders an opportunity to hear from a practitioner who has led the team in Atlanta Public Schools in their restorative justice plan to positively support students. Attendees will also hear about how a collaborative relationship between safety/police and student services can lead to positive outcomes in our goal of reducing the school to prison pipeline.</p>
<p>2:45pm - 4:15pm</p> <p><b>Regal Suite</b></p>	<p><b>Success of Succeed Boston - Bullying Prevention Strategies</b>  <i>Jodi Elgee, Senior Director of Succeed Boston, Boston Public Schools</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Demonstrate how effective bully prevention strategies have impacted students in Boston Public Schools</li> <li>- Sharing of best practices that support both the victim and aggressor to ultimately change behavior</li> <li>- Learn how Succeed Boston provides ongoing case management and support for students who may be impacted by bullying and violence</li> </ul> <p>Session Description</p> <p>Succeed Boston has been a successful program in Boston Public Schools that is implemented district wide. Police/Safety leaders will learn firsthand how this program was implemented and how BPS has benefited from this integrated approach to both bully and violence prevention.</p>
<p>4:30pm - 5:00pm</p> <p><b>Regal Suite</b></p>	<p><b>Prep for COO Attendance Tomorrow</b>  <i>Facilitated by Mike Eaton and Jason Matlock</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Identify panel members</li> <li>- Craft discussion questions</li> </ul> <p>Session Description</p> <p>Work session to maximize time together with COOs.</p>

Wednesday, November 9

**Food Services**

1:15pm - 2:00pm

**Royal Conti**

**Child Nutrition Employee – Labor and Recruitment Efforts  
(Closed Session: School District Staff Only)**

*Cassi Hechler, Human Resource Coordinator, Palm Beach County Public Schools*

Learning Objectives

- Demonstrate best practices
- Develop strategies that improve recruitment efforts
- Gather information
- Identify lessons learned

Session Description

Current staffing shortages and a changing labor market have required aggressive recruitment efforts to meet the demands of school nutrition programs. Participants will engage with the presenter and other participants in effort to create a recruitment plan that best meets the needs of the district and department.

2:15pm - 3:00pm

**Royal Conti**

**Child Nutrition Employee - Training Needs and the Development of an Orientation Plan  
(Closed Session: School District Staff Only)**

*Cassi Hechler, Human Resource Coordinator, Palm Beach County Public Schools*

Learning Objectives

- Identify employee training needs
- Develop training and orientation plan
- Presenter will demonstrate best practices
- Gather information from districts with successful plans

Session Description

Due to current staffing needs, high quality training and an orientation plan is essential in the recruitment and retainment of employees. Districts have recently experienced high turnover rates resulting in a labor force unfamiliar with child nutrition standards. Training is essential and helps improve performance, program knowledge and overall kitchen efficiency. Participants will leave with knowledge and strategies to help develop and implement a successful training program.

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3:15pm - 4:00pm

**Royal Conti**

**Child Nutrition Compensation Manual Review  
(Closed Session: School District Staff Only)**

*Betti Wiggins, Nutrition Services Officer, Houston ISD  
Frank Milton, General Manager of Compliance and  
Accountability, Houston ISD*

Learning Objectives

- Demonstrate best practices
- Gather information and prepare for next steps in developing and/or reviewing existing compensation structure
- Explore compensation options
- Identify participants for the review or generation of a manual

Session Description

This session will engage participants in a discussion around food service employee compensation and the possible creation of a department manual. Participants will review an actual manual from a peer district to generate conversation and help establish best practices. This session will review District compensation practices to compare districts who include food service with other operational categories (i.e. custodial) or view as a standalone.

4:15pm - 5:00pm

**Royal Conti**

**Child Nutrition - Retaining and Recognizing Employees  
(Closed Session: School District Staff Only)**

*Betti Wiggins, Nutrition Services Officer Houston ISD  
Frank Milton, General Manager of Compliance and  
Accountability, Houston ISD*

Learning Objectives

- Identify how employee recognition programs work
- Identify guidelines and criteria to establish recognition practices that include bonus pay
- Identify steps needed at the district level to move the initiative forward
- Develop best practices
- Gather information

Session Description

Participants will engage with the presenter in the design, implementation and roll-out of a recognition

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	<p>program geared toward food service employees. Discuss how recognitions can improve employee performance and employee-employer relations. Develop best practices and generate peer discussion to help identify next steps.</p>
<p>5:00pm - 6:30pm</p> <p><i>Fleur de Lis and Courtyard</i></p>	<p><b>Reception and Awards Ceremony</b></p>

Thursday, November 10	
7:00am - 7:45am <i>Fleur de Lis</i>	<b>Breakfast</b>
8:00am – 12:00pm	<b>Breakout Sessions by Functional Area</b>
<b>COO + Safety and Security Joint Session</b>	
8:00am - 8:45am <b>Grand Ballroom</b>	<p><b>Homeland Security Information Network (HSIN) for School Safety Information Sharing</b> <i>Keith Rossmiller, Senior Mission Advocate, HSIN</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Understand HSIN resources available to support school safety information sharing</li> <li>- Understand the process to develop HSIN information sharing resources</li> <li>- Understand the five core services planned in the new comprehensive HSIN platform</li> <li>- Understand how school safety professionals can become involved in the development of the new comprehensive HSIN platform</li> </ul> <p>Session Description HSIN Mission Advocate will provide an overview of HSIN and the resources available for school safety information sharing within the current HSIN platform. HSIN will explain the process involved to develop these resources for school safety information sharing. HSIN will identify the five core services planned in the new comprehensive HSIN platform and explain how school safety professionals can become involved in the development.</p>
9:00am - 9:45am <b>Grand Ballroom</b>	<p><b>Challenges School Safety Teams are Facing Regarding Critical Incidents</b> <i>Panel discussion, facilitated by Jason Matlock</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Review the lessons learned from the most recent tragedies across the country</li> <li>- Weigh in on what broad approaches have worked and which have fallen short</li> </ul> <p>Session Description Leaders from across the council will share how tragedies and responses by policy makers have impacted their work.</p>

Thursday, November 10	
<p>10:00am - 10:45am</p> <p><b>Grand Ballroom</b></p>	<p><b>How COVID Has Impacted Student Behavior, Crime, and Schools</b>  <i>Panel discussion, facilitated by Mike Eaton</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Understand the scope of the impact that COVID lockdowns have had on school safety operations</li> <li>- Gather best practices from the lessons learned</li> </ul> <p>Session description</p> <p>Leaders from across the council will share their experiences around COVID response and its impact on security operations, including any adaptations were needed.</p>
<p>11:00am - 11:45am</p> <p><b>Grand Ballroom</b></p>	<p><b>How Have Police Reform Approaches Affected School/Police Partnerships</b>  <i>Panel discussion</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Understand the whole story behind the impacts to school districts shifting away from police partnerships</li> <li>- Gather enhancements that can improve operations no matter what the model</li> </ul> <p>Session Description</p> <p>There have been many stories written and assumptions made about districts that cut ties with local police in the wake of the murder of George Floyd. Hear directly from leaders who had to remake programs with years of history in as little as 3 months.</p>
<p><b>Facilities and Plant Operations</b></p>	
<p>8:00am - 8:45am</p> <p><b>Evangeline – B/C</b></p>	<p><b>Case Study: Unlocking Efficiency and Savings through Active Operations as a Service</b>  <i>Chris Farkas, Chief Operating Officer, Hillsborough County Public Schools</i>  <i>Steve Gossett Jr., Operating Partner, Generate Capital</i>  <i>Phillip Saieg, Vice President of Technical Services, McKinstry</i>  <i>Essention, LLC</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Understand the opportunities, benefits and challenges associated with wide-scale modernization of the HCPS Operations and Maintenance Program</li> <li>- Discuss cost savings associated with passive vs active O&amp;M management</li> <li>- Discuss O&amp;M change management challenges and solutions</li> </ul>

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	<ul style="list-style-type: none"> <li>- Learn how an alternative financing model can accelerate change and enable wholistic O&amp;M solutions</li> </ul> <p>Session Description K-12 facility operators must react to aging infrastructure, escalating operating costs, and increased pressure to drastically reduce carbon footprints. What strategies can be implemented to proactively address these complex problems? In this program, we will highlight an outcome-based approach to operations and maintenance that is being implemented across Hillsborough County Public Schools. This innovative program aligns incentives between public and private partners, and leverages technology to help facility operators track, analyze, and optimize their O&amp;M program.</p>
<p>9:00am - 9:45am</p> <p><b><i>Evangeline – B/C</i></b></p>	<p><b>Post-Katrina School Facility Preservation in New Orleans, Louisiana</b> <i>Tiffany Delcour, Chief Operating Officer, New Orleans Public Schools</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Understand the proactive steps NOLA Public Schools has taken to ensure recent investments in school facilities as a result of Hurricane Katrina are preserved for future generations</li> <li>- Understand the components of a proactive tax plan that support future school facility needs as opposed to reactive capital planning</li> </ul> <p>Session Description After Hurricane Katrina decimated most school facilities in New Orleans the Orleans Public School System received nearly \$2 billion in capital funding to re-envision our school facility infrastructure. Nearly 17 years later, the reconstruction of our schools is nearly complete, and the school systems has successfully passed a tax plan that provides proactive funding to the school system that provides the funds needed to plan for the capital needs of these newer facilities over their lifetime, a very different approach than the reactive tax plans most school have.</p>
<p>10:00am - 10:45am</p> <p><b><i>Evangeline – B/C</i></b></p>	<p><b>We Did a Facility Condition Assessment – Now What?</b> <i>Patrick McGough, CMMS Manager, Baltimore City Public Schools (BCPS)</i> <i>Monique Roumo, Director of Strategy and Compliance, Operations, BCPS</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Use relevant asset-centered information and intelligence to make data-driven decisions</li> </ul>



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	<p>Session Description This workshop will be a conversation around how the Operations team at Baltimore City Public Schools has begun to use the data from its Facility Condition Assessment to start to depoliticize project priorities and use real analytical data and strategic portfolio priorities for project identification and selection, increase transparency and understanding of maintenance and capital planning practices, and engage communities and stakeholders with relevant information and intelligence.</p>
<p>11:00am - 11:45am <b>Evangeline – B/C</b></p>	<p><b>Facility/Campus Repurposing – Becoming More Efficient in a Mature Urban School District</b> <i>Matias Segura, Chief Operating Officer, Austin Independent School District</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"><li>- Develop real estate portfolio management strategies</li><li>- Identify lessons learned from school repurposing methodology</li><li>- Tailor community engagement strategies</li><li>- Identify city development partnership strategies</li><li>- Identify steps to educate your board regarding real estate</li></ul> <p>Session Description Austin ISD explores creative long term sustainable solutions to mitigate system challenges including aging infrastructure, costly construction, changing city population densities, and an affordability crisis. This presentation will focus on repurposing and real estate strategies used by AISD to generate revenue and reduce costs allowing for much needed initiatives to be funded.</p>
<p><b>Transportation</b></p>	
<p>8:00am - 8:45am <b>Evangeline – A</b></p>	<p><b>Hiring, Recruiting, and Retention of Bus Drivers</b> <i>Nathan Graf, Senior Executive Director of Transportation, San Antonio Independent School District</i> <i>Kris Hafezizadeh, Transportation Director, Austin Independent School District</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"><li>- Effective strategies and programs will be discussed that address the nationwide bus driver shortage and how to minimize the impact.</li></ul> <p>Session Description Hiring school bus drivers should be a year-round activity, not</p>

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	<p>just during the summer. Strategies and programs will be discussed on how to create a year-round recruitment program along with hiring strategies and retention programs.</p>
<p>9:00am - 9:45am</p> <p><b>Evangeline – A</b></p>	<p><b>Bus Routing &amp; Tiering to Maximize Student Ridership and Activity</b>  <i>Nathan Graf, Senior Executive Director, San Antonio Independent School District</i>  <i>Kris Hafezizadeh, Transportation Director, Austin Independent School District</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Discuss and explore routing strategies that maximize student ridership and minimize the number of drivers needed</li> </ul> <p>Session Description</p> <p>School bus routing is truly an art form. Various routing options and programs will be discussed that increase the efficiencies and effectiveness of a transportation department.</p>
<p>10:00am - 10:45am</p> <p><b>Evangeline – A</b></p>	<p><b>How Alternative Transportation Helped Orange County Public Schools Get Kids in the Classroom Despite the Driver Shortage</b>  <i>Bill Wen, Senior Director of Transportation Services, Orange County Public Schools</i>  <i>Brad Muirbrook, Vice President of Strategic Initiatives, Ever Driven</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Understand how alternative transportation is used in Orange County Public Schools to supplement the bussing system to get kids in the classroom given the bus driver shortage</li> <li>- Learn how the combination of technology and team work together for effective and efficient alternative transportation</li> <li>- Discover proactive safety measures your alternative transportation vendor should be taking</li> </ul> <p>Session Description</p> <p>In this session you'll learn how Orange County Public Schools uses Alternative Transportation to safely get kids in the classroom, ready to learn, the role that technology and teamwork plays to make it happen, and the proactive safety measures districts should request of their vendors to ensure their students are in a safe vehicle with a safe, non-CDL drivers.</p>

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<p>11:00am - 11:45am</p> <p><b><i>Evangeline – A</i></b></p>	<p><b>Electric School Buses</b>  <i>Bill Wen, Senior Director of Transportation Services, Orange County Public Schools</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- To discuss the purchase and implementation of electric school buses into the fleet</li> </ul> <p>Session Description</p> <p>Many school districts across the nation are diversifying school bus fleets with electric buses. This session will cover factors to consider when purchasing electric buses and how to implement these into a school bus fleet.</p>
<p><b>Food Services</b></p>	
<p>8:00am - 8:45am</p> <p><b><i>Royal Conti</i></b></p>	<p><b>SFE Presentation</b>  <i>Yvette Turner, Regional Director of Business Development, Southwest Foodservice Excellence (SFE)</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- To be provided on-site</li> </ul> <p>Session Description</p> <p>To be provided on-site</p>
<p>9:00am - 9:45am</p> <p><b><i>Royal Conti</i></b></p>	<p><b>Review - Meals per Labor Hour Model</b>  <b><i>(Closed Session: School District Staff Only)</i></b>  <i>Kimber Dillon, Director of Operations, Child Nutrition Services, San Antonio ISD</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Review District Model</li> <li>- Discuss other district practices</li> <li>- Review established targets</li> <li>- Discuss other data points</li> </ul> <p>Session Description</p> <p>The tracking of meals per labor hour is one of the most crucial KPIs in food service programs. The campus will experience a variety of operational deficiencies when campuses are not adequately staffed. Conversely department budgets will suffer if campuses are over-staffed. Discuss and review district models to generate a peer conversation to help establish best practices.</p>

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<p>10:00am - 10:45am</p> <p><b>Royal Conti</b></p>	<p><b>Roundtable Discussion - Review and follow up on any previous discussions and presentations</b>  <i>(Closed Session: School District Staff Only)</i>  <i>All participants</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Follow up on any previous presentations</li> <li>- Look ahead to 2023-2024 school year</li> <li>- Networking</li> </ul> <p>Session Description</p> <p>This session will allow participants to discuss any pending questions from any of the conference presentations covered. This time will also allow for extended conversations around any of the topics presented and discussed. Will also allow for the opportunity to discuss and look ahead at the 2023-2024 school year.</p>
<p>11:00am - 11:45am</p> <p><b>Royal Conti</b></p>	<p><b>Preparation Time for COO Joint Session</b>  <i>All participants</i></p> <p>Learning objectives</p> <ul style="list-style-type: none"> <li>- Provide useful information on the identified topics that help leaders support and better understand Child Nutrition programs</li> </ul> <p>Session Description</p> <p>This time will be used to review and discuss the identified topics, provide clarification, and formulate questions.</p>
<p>12:00pm - 1:00pm</p> <p><b>Fleur de Lis</b></p>	<p><b>Lunch</b></p>
<p>1:15pm - 5:00pm</p>	<p><b>Breakout Sessions by Functional Area</b></p>
<b>COO + Food Services Joint Session</b>	
<p>1:15pm - 2:00 pm</p> <p><b>Grand Ballroom</b></p>	<p><b>Community Eligibility Provision (CEP)</b>  <i>Cassi Hechler, Human Resource Coordinator, Palm Beach County Public Schools</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Understanding the benefits of CEP</li> <li>- Learning how to qualify districtwide or schoolwide</li> <li>- Learning the CEP cycle</li> <li>- Understanding the timeline</li> </ul>

Thursday, November 10	
	<p><b>Session Description</b>  This session will provide information on CEP and how it impacts meal programs. This session will provide useful information for districts who are considering operating CEP. Campus and department benefits to include funding will also be reviewed.</p>
<p>2:15pm - 3:00pm   <b>Grand Ballroom</b></p>	<p><b>Addressing Unpaid Student Meal Debt</b>  <i>Penny Parham, Food and Nutrition Officer, Miami-Dade County Public Schools</i></p> <p><b>Learning Objectives</b></p> <ul style="list-style-type: none"> <li>- Gather information and prepare strategies</li> <li>- Explore options</li> <li>- Identify who needs to be involved in the process</li> </ul> <p><b>Session Description</b>  This session will provide information on the growing problem of unpaid student meal debt. The presenter will discuss factors that contribute to the increase in the amount of unpaid student meal debt. How students in the reduced-price category contribute to the growing problem and what solutions are available to assist Child Nutrition programs with the issue. Is there any relief in sight at the Federal level and what other options do districts have to focus on feeding children?</p>
<p>3:15pm - 4:00pm   <b>Grand Ballroom</b></p>	<p><b>Leveraging Technology to Drive Productivity and Employee Behavior</b>  <i>Charles Mayfield, Interim Chief Operating Officer, Chicago Public Schools</i></p> <p><b>Learning Objective</b></p> <ul style="list-style-type: none"> <li>- Identify ways to leverage technology to get broad spend coverage of categories</li> </ul> <p><b>Session Description</b>  Learn best practices that Chicago Public Schools are using to remain compliant and put dollars back into the classroom. Get the step-by-step process on how to leverage technology to drive productivity and employee behavior. Chief Financial and Operating Officers and Procurement Directors will obtain a transparent guide on how to implement tools to ensure compliance practices are aligned.</p>

Thursday, November 10	
<p>4:15pm - 5:00pm</p> <p><b>Grand Ballroom</b></p>	<p><b>Joint Session with Safety: Outside Food Vendors on Campus</b>  <i>Michael Eaton, Chief Department of Climate and Safety, Denver Public Schools</i>  <i>Jenny Arredondo, Senior Executive Director of Child Nutrition Services, San Antonio ISD</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Share best practices around school safety and outside food vendors</li> <li>- Foster collaboration between School Safety professionals and Food Service Directors</li> </ul> <p>Session Description</p> <p>This session will focus on the growing safety concerns caused by outside food vendors on campus during the school day. How are districts addressing the growing concern? Presenters and attendees can share best practices that will aid in the development of a plan. Information will prepare participants for next steps and conversations that will lead to a safer school environment.</p>
<p><b>Facilities and Plant Operations</b></p>	
<p>1:15pm - 2:00pm</p> <p><b>Evangeline – B/C</b></p>	<p><b>How Your Team Dynamic and Collaboration Can Facilitate Change in the Department</b>  <i>Bill Levy, Executive Director of Facilities, Baltimore City Public Schools (BCPS)</i>  <i>Monique Roumo, Director of Strategy and Compliance, Operations, BCPS</i></p> <p>Learning Objective</p> <ul style="list-style-type: none"> <li>- Identify ways to reinvent or innovatively bring an idea, strategy, plan, process, or procedure into existence</li> </ul> <p>Session Description</p> <p>This workshop will be a conversation around how the Operations team at Baltimore City Public Schools has stepped outside the box with looking at how to adopt and implement a culture of continuous improvement within a department to improve productivity, efficiency, and service delivery. The focus will be on what innovative and strategic steps have been taken to foster positive change.</p>
<p>2:00pm – 2:30pm</p> <p><b>Evangeline – B/C</b></p>	<p><b>Plan for Friday Report Out</b>  <i>All participants</i></p> <p>Learning Objectives</p> <ul style="list-style-type: none"> <li>- Identify key topics and themes to share with all attendees on Friday morning</li> </ul>

Thursday, November 10	
	<p><b>Session Description</b>            During this session, participants will identify the topics, key takeaways, open questions, and themes from the week to share with the whole group on Friday morning.</p>
<p>2:30pm - 3:15pm   <b>Regal Suite</b></p>	<p><b>Alyssa’s Law: Hillsborough County Schools’ Journey to Campus Safety</b>  <i>John Newman, Chief of Security and Emergency Management, Hillsborough County Public Schools</i>  <i>Alysse Daniels, Senior RVP, Centegix</i></p> <p><b>Learning Objectives</b></p> <ul style="list-style-type: none"> <li>- Identify the background and history of Alyssa’s Law</li> <li>- Identify valuable insights into the full ecosystem of safety and security in schools: prevention, preparation, and response</li> <li>- Identify leading practices for how to implement any school safety legislation</li> <li>- Identify the role school safety and security plays in teacher retention and recruitment efforts</li> </ul> <p><b>Session Description</b>            In this session, learn how Florida school districts have managed the legislative mandates that have come out of the Marjory Stoneman Douglas High School shooting in Parkland, FL. Presenters will also discuss the process of transitioning from an app-based emergency response solution to a wearable badge-based emergency response solution to exceed the requirements of Alyssa’s Law.</p>
<p>3:30pm - 4:15pm   <b>Evangeline – B/C</b></p>	<p><b>Spending Down ESSER Funds: Quality Assurance and Quality Control</b>  <i>Alex Belanger, Chief Executive of Operational Services, Fresno Unified School District</i></p> <p><b>Learning Objectives</b></p> <ul style="list-style-type: none"> <li>- Identify rules for spending down funds within timelines</li> <li>- Identify processes for gathering stakeholder feedback and engagement</li> <li>- Implementing quality control and quality assurance processes</li> </ul> <p><b>Session Description</b>            During this discussion, participants will identify the best path forward for spending down ARP (ESSER III) funds by the obligation deadline of September 2024. Participants will engage in discussions around quality assurance, quality control, stakeholder engagement and feedback, and how to incorporate KPI data into planning.</p>

Thursday, November 10

**Safety and Security**

1:15pm - 2:15pm

**Regal Suite**

**Group Discussion: Athletic Event Security– Trends and Concerns**

*Facilitated by Mike Eaton and Jason Matlock*

Learning Objectives

- Understand what challenges are being seen across the council
- Share successes and lessons learned

Session Description

With the increase in attention being paid to incidents at athletic events and other after school activities, the group will share their learnings and insights.

2:30pm - 3:15pm

**Regal Suite**

**Alyssa’s Law: Hillsborough County Schools’ Journey to Campus Safety (Joint Session: Facilities Teams)**

*John Newman, Chief of Security and Emergency Management,  
Hillsborough County Public Schools  
Alysse Daniels, Senior RVP, Centegix*

Learning Objectives

- Identify the background and history of Alyssa’s Law
- Identify valuable insights into the full ecosystem of safety and security in schools: prevention, preparation, and response
- Identify leading practices for how to implement any school safety legislation
- Identify the role school safety and security plays in teacher retention and recruitment efforts

Session Description

In this session, learn how Florida school districts have managed the legislative mandates that have come out of the Marjory Stoneman Douglas High School shooting in Parkland, FL. Presenters will also discuss the process of transitioning from an app-based emergency response solution to a wearable badge-based emergency response solution to exceed the requirements of Alyssa’s Law.

3:15pm - 4:00pm

**Regal Suite**

**Roundtable Working Session: Follow Up on Any Topics Not Fully Resolved**

*Facilitated by Mike Eaton and Jason Matlock*

Learning objective

- Wrap up any unfinished work or topic conversations

Session Description

Open time to get answers to questions not covered, space to continue conversations around KPIs or the safety blueprint.



**Thursday, November 10**

4:15pm - 5:00pm  
**Grand Ballroom**

**Joint Session with Food Service: Outside Food Vendors on Campus**

*Michael Eaton, Chief Department of Climate and Safety, Denver Public Schools*  
*Jenny Arredondo, Senior Executive Director of Child Nutrition Services, San Antonio ISD*

Learning Objectives

- Share best practices around school safety and outside food vendors
- Foster collaboration between School Safety professionals and Food Service Directors

Session Description

This session will focus on the growing safety concerns caused by outside food vendors on campus during the school day. How are districts addressing the growing concern? Presenters and attendees can share best practices that will aid in the development of a plan. Information will prepare participants for next steps and conversations that will lead to a safer school environment.

**Transportation**

1:15pm - 2:00pm  
**Evangeline – A**

**Effective School Bus Fleet Maintenance**

*Jim Beekman, General Manager of Transportation, Hillsborough County Public Schools*

Learning Objective

- Maintain a safe and effective school bus fleet

Session Description

Effectively and efficiently maintaining a school bus fleet can seem complicated and difficult. But with the right tools this seemingly impossible task is easy. Discussion will center around effective tools that will help a transportation department maintain a safe and efficient school bus fleet.

2:15pm - 3:00pm  
**Evangeline – A**

**Interpreting KPI Data**

*Jim Beekman, General Manager of Transportation, Hillsborough County Public Schools*

Learning Objective

- Understand how KPI data can improve the effectiveness and efficiency of a transportation department

Session Description

The essential KPI indicators will be discussed in detail. This includes how they are measured and what items to factor into the analysis. Also, the importance of tracking one's own KPI

Thursday, November 10	
	<p>results year-over-year and how to measure against another school district's data will be explored.</p>
<p>3:15pm - 4:00pm</p> <p><b>Evangeline – A</b></p>	<p><b>Roundtable on Strategizing for 23-24 School Startup</b>  <i>Jim Beekman, General Manager of Transportation, Hillsborough County Public Schools</i>  <i>Nathan Graf, Senior Executive Director of Transportation, San Antonio Independent School District</i></p> <p>Learning Objective  <ul style="list-style-type: none"> <li>- Identify strategies to have a smooth school year startup</li> </ul> </p> <p>Session Description            Every school year startup within a transportation department is like opening a brand-new business for the first time. Effective strategies will be discussed - along with timeliness - to ensure a smooth and successful school startup.</p>
<p>4:15pm - 5:00pm</p> <p><b>Evangeline – A</b></p>	<p><b>Communications and Building Morale</b>  <i>Kim Frye, Director Transportation Services, Orange County Public Schools</i></p> <p>Learning Objective  <ul style="list-style-type: none"> <li>- How to build communications and increase morale</li> </ul> </p> <p>Session Description            Many folks will say "It is only school bus transportation; how hard can it be?" Those in the industry know exactly how hard it can be. In this session participants will learn the importance of clear and accurate communication and how essential this is in building morale among the team. A team with high morale will go to the ends of the world for a department and school district.</p>
<p><b>Evening on your own</b></p>	

Friday, November 11	
<p>7:00am - 8:00am</p> <p><b>Grand Ballroom</b></p>	<p><b>Breakfast</b></p>
<p>8:15am - 10:15am</p> <p><b>Grand Ballroom</b></p>	<p><b>General Session: Report Out</b></p> <ul style="list-style-type: none"> <li>- Facilities and Plant Operations</li> <li>- Transportation</li> <li>- Safety and Security</li> </ul>

Friday, November 11	
	- Food Services
10:30am - 12:00pm <i>Grand Ballroom</i>	<b>Round Robin Discussion: What have we learned and where do we go from here?</b> Boxed lunches available
12:00pm	<b>Meeting Adjourns</b>

**CHIEF FINANCIAL OFFICERS, CHIEF HUMAN  
RESOURCE OFFICERS, PURCHASING DIRECTORS,  
RISK MANAGERS, AND INTERNAL AUDITORS  
MEETING**



**2023**

**Meeting of Directors and Chiefs of Finance,  
Human Resources, Purchasing,  
Risk Management and Internal Auditors**

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# **REGISTRATION BROCHURE**

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**February 14 - 17, 2023  
Los Angeles, CA**

**Sheraton Grand Los Angeles  
711 South Hope Street  
Los Angeles, California, 90017  
213-488-3500**



# 2023 Meeting of Directors and Chiefs of Finance, Human Resources, Purchasing, Risk Management, and Internal Auditors

Sheraton Grand Los Angeles | Los Angeles, CA  
February 14-17, 2023

Register online at: <https://cvent.me/4OReDd>

## DRAFT AGENDA

### **TUESDAY, February 14, 2023**

7:00 am - 8:00 am	Breakfast
8:15 am - 12:00 pm	General Session (all attendees)
12:00 pm - 1:00 pm	Lunch
1:15 pm - 4:00 pm	General Session (all attendees)
4:00 pm - 5:00 pm	ROLE ALIKE SESSIONS: Chief Financial Officers, Chief Human Resources Officers, Purchasing Directors, Risk Management Directors, Internal Auditors
5:00 pm	Welcome Reception and Awards Ceremony

### **WEDNESDAY, February 15, 2023**

7:00 am - 8:00 am	Breakfast
8:15 am - 12:00 pm	ROLE ALIKE SESSIONS: Chief Financial Officers, Chief Human Resources Officers, Purchasing Directors, Risk Management Directors, Internal Auditors
12:00 pm - 1:00 pm	Lunch
1:15 pm - 5:00 pm	ROLE ALIKE SESSIONS: Chief Financial Officers, Chief Human Resources Officers, Purchasing Directors, Risk Management Directors, Internal Auditors
5:00 pm	Reception and Awards Ceremony

### **THURSDAY, February 16, 2023**

7:00 am - 8:00 am	Breakfast
8:15 am - 12:00 pm	ROLE ALIKE SESSIONS: Chief Financial Officers, Chief Human Resources Officers, Purchasing Directors, Risk Management Directors, Internal Auditors
12:00 pm - 1:00 pm	Lunch
1:15 pm - 5:00 pm	ROLE ALIKE SESSIONS: Chief Financial Officers, Chief Human Resources Officers, Purchasing Directors, Risk Management Directors, Internal Auditors
Evening	Evening on Your Own - Enjoy Los Angeles

### **FRIDAY, February 17, 2023**

7:00 am - 8:00 am	Breakfast
8:00 am - 11:00 am	General Session (all attendees): Report Out from Role Alike Sessions <b>What Have We Learned? Where Do We Go from Here?</b>
11:00 am - 12:00 pm	Boxed Lunch and Departure



## 2023 Meeting of Directors and Chiefs of Finance, Human Resources, Purchasing, Risk Management, and Internal Auditors

Sheraton Grand Los Angeles | Los Angeles, CA  
February 14-17, 2023

### REGISTRATION INFORMATION

- \$300 Council School District Member
- \$300 College of Education Member
- \$450 Non-Member District
- \$1,000 Additional person from company sponsoring
- \$75 added late fee registration after January 23, 2023

### SPONSORSHIP INFORMATION

**Diamond Level: \$15,000**

- Entry into full day events
- Awards Reception Sponsor
- District-led presentation with Chief Financial Officers or Chief Human Resources Officers
- Prominent logo and name placement via signage, banner, and conference program
- Recognized in annual report
- Recognized via the conference mobile app
- Early distribution of attendee list (January 23rd and February 6th)
- Entitled to share gifts and/ or materials with attendees
- Three registrants included

**Platinum Level: \$10,000**

- Entry into full day events
- District-led presentation with Purchasing, Risk Management, or Internal Auditors
- Recognized via signage, banner, conference program, annual report
- Recognized via conference mobile app
- Early distribution of attendee list (January 23rd and February 6th)
- Entitled to share gifts and/ or materials with attendees
- Two registrants included

**Gold Level \$7,500**

- Entry into full day events
- Recognized via signage, banner, conference program, annual report
- Recognized via conference mobile app
- Early distribution of attendee list (January 23rd)
- Entitled to share gifts and/ or materials with attendees
- One registrant included

**Silver Level \$5,000**

- Entry into full day events
- Recognized via conference mobile app
- Entitled to share gifts and/ or materials with attendees
- One registrant included



## 2023 Meeting of Directors and Chiefs of Finance, Human Resources, Purchasing, Risk Management, and Internal Auditors

Sheraton Grand Los Angeles | Los Angeles, CA  
February 14-17, 2023

Hotel reservations for the conference will be made by individual attendees by calling directly to the hotel at 213-488-3500. Identify yourself with CGCS to receive the special discounted group rate of \$239 single/ double plus 16.2% tax. You can also find a link to make reservations online on [cgcs.org](http://cgcs.org).

Meeting Room may be chilly; please bring a sweater, blazer or wrap

Check-in Time: 3 p.m.      Check-out Time: 12 p.m.

Valet Parking

No Self-Parking

ATTIRE: Business

**Hotel reservations for the conference will be made by individual attendees by calling directly to the hotel at 213-488-3500. Identify yourself with CGCS to receive the special discounted group rate of \$239 single/ double plus 16.2% tax.**

You may also reserve your room using this link: [CGCS - CHRO and CFO Joint Meeting - Start your reservation](#)

The cutoff date for the group rate is January 20, 2023.

**Space is limited. Call to make reservations as soon as possible. A valid credit card is required and applied to first night of reserved stay. Hotel Cancellation Policy: Deposits are refundable for cancellations occurring up to 72 hours prior to arrival.**

### **Conference Registration Refund and Cancellation Policy:**

All conference registration cancellations, refund requests, or substitutes must be made in writing and emailed to Gregory Bacon at [gbacon@cgcs.org](mailto:gbacon@cgcs.org). Registrations cancelled on or before January 23, 2023, will receive a full refund.

Cancellations made January 23rd - January 30th will be billed or refunded 50% of the registration fee. Cancellations

after January 30th or no-shows during the conference **will not** receive a refund and will be billed the full amount.

Purchase orders **will not** be accepted for those registering on-site.

**For checks-** indicate on check the invoice number, registrant's name, and list name of the conference. (CFO/CHRO 2023)



## ABOUT THE COUNCIL

The Council of the Great City Schools brings together the nation's largest urban public school systems in a coalition dedicated to the improvement of education for children in the inner cities. The Council and its member school districts work to help our schoolchildren meet the highest standards and become successful and productive members of society. The organization also helps to build capacity in urban education with programs to boost academic performance and narrow achievement gaps; improve professional development; enhance the opportunity to learn; and strengthen leadership, governance, and management. The Council accomplishes its mission by connecting urban school districts from coast to coast who work under similar conditions.

## COUNCIL DISTRICT MEMBERS

Albuquerque, Anchorage, Arlington (Texas), Atlanta, Aurora (Colorado), Austin, Baltimore, Birmingham, Boston, Bridgeport, Broward County, Buffalo, Charleston, Charlotte-Mecklenburg, Chicago, Cincinnati, Clark County (Las Vegas), Cleveland, Columbus, Dallas, Dayton, Denver, Des Moines, Detroit, Duval County, East Baton Rouge, El Paso, Fayette County (Lexington), Fort Worth, Fresno, Guilford County (Greensboro, N.C.), Hawaii, Hillsborough County, Houston, Indianapolis, Jackson, Jefferson County (Louisville), Kansas City, Little Rock, Long Beach, Los Angeles, Memphis-Shelby, Miami-Dade County, Milwaukee, Minneapolis, Nashville, New Orleans, New York City, Newark, Norfolk, Oklahoma City, Omaha, Orange County (Florida), Palm Beach County, Philadelphia, Phoenix Union, Pinellas County, Pittsburgh, Portland, Providence, Puerto Rico, Richmond, Rochester, Sacramento, San Antonio, San Diego, San Francisco, Santa Ana, Seattle, St. Louis, St. Paul, Toledo, Tulsa, Washington, D.C., Washoe County (Reno), Wichita, and Winston Salem/Forsyth County



COUNCIL OF THE GREAT CITY SCHOOLS  
1331 PENNSYLVANIA AVENUE, N.W.  
SUITE 1100N  
WASHINGTON, D.C. 20004

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