

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

**COUNCIL OF THE GREAT CITY SCHOOLS**

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

**2023-2024**

***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 Chair***

Joyce Wilkerson, Philadelphia School Board

***Task Force Members***

Brandon Craig, Cincinnati School Board  
Valerie Davis, Fresno School Board  
Roger Leon, Newark Superintendent  
Mary Skipper, Boston Superintendent

# **LEADERSHIP**

**MICHAEL CASSERLY INSTITUTE**





# The Michael Casserly Urban Executive Leadership Institute

## 2024 COHORT



**Rochelle Cox**  
Interim Superintendent  
Minneapolis Public Schools



**Dr. Drew Echelson**  
Chief of Schools and Accountability  
Boston Public Schools



**Dr. Karla Estrada**  
Deputy Superintendent  
Los Angeles Unified School District



**Dr. Fateama Fulmore**  
Deputy Superintendent  
NOLA Public Schools



**Jose Martinez**  
Chief of High Schools  
Orange County Public Schools



**Dr. Dexter Moore, Jr.**  
Chief of Staff  
Oakland Unified School District



**Dr. Eric Rosser**  
Superintendent  
Poughkeepsie City School District



**Andrew Strobe**  
Deputy Superintendent  
Indianapolis Public Schools



**Shannon Trejo**  
Deputy Commissioner of School Programs  
Texas Education Agency



**Dr. Angela Whitelaw**  
Deputy Superintendent  
Memphis-Shelby County Schools



# Council of the Great City Schools

THE NATION'S VOICE FOR URBAN EDUCATION

**Michael Casserly Urban Executive Leadership Institute  
for Aspiring Superintendents  
October 23 – 24, 2023  
Hilton San Diego Bayfront  
1 Park Boulevard  
San Diego, CA 92101**

*Session Focus: Equity and Ethics*

*Session Sponsor: K12Insight*

## AGENDA

<b>Monday, October 23</b> <i>Please note meals and the meeting are in Cobalt 500, located on the 5<sup>th</sup> floor.</i>	
9:30am	<b>Breakfast</b>
10:07am	<b>Ethics in Leadership</b> <i>Dr. Julia Keleher, Former Secretary, Puerto Rico Department of Education (virtual)</i> <i>Dr. Michael Hinojosa, Superintendent-in-Residence, CGCS</i> <i>Dr. Michael Casserly, Namesake, Strategic Advisor, former Executive Director, CGCS</i>
11:30am	<b>Team De-Brief regarding Ethical Conduct</b>
12:00pm	<b>Lunch</b>
1:00pm	<b>Equity Panel</b> <i>Facilitator: Dr. Michael Hinojosa, Superintendent-in-Residence, CGCS</i> <i>Dr. Jill Baker, Superintendent, Long Beach Unified School District</i> <i>Dr. Barbara Jenkins, Former Superintendent, Orange County Public Schools</i> <i>Dr. Kelvin Adams, Former Superintendent, St. Louis Public Schools</i>
2:00pm	<b>Nominal Group Technique: What is missing?</b> <i>Dr. Michael Hinojosa, Superintendent-in-Residence, CGCS</i>
3:00pm	<b>Likes and Wonderings</b>
5:30pm	<i>Meet at Gull Street Entrance to take buses to dinner. This is on the first floor Promenade level in between the hotel and the parking garage.</i>
6:00pm	<b>Reception and Dinner at Peohe (Sponsored by K12 Insight)</b>



# Council of the Great City Schools

THE NATION'S VOICE FOR URBAN EDUCATION

**Tuesday, October 24**

*Please note meals and the meeting are in Cobalt 500, located on the 5<sup>th</sup> floor.*

8:00am	<b>Breakfast</b>
9:07am	<b>How to Get THE Job – Search Firm Panel</b> <i>Alton Frailey, Chief Search Officer, JG Consulting</i> <i>Gary Ray, President and Chief Executive Officer, GR Recruiting</i> <i>Micah Ali, Urban Superintendent Talent Recruiter, Hazard, Young, Attea Associates</i> <i>Monica Santana Rosen, Chief Executive Officer, Alma Advisory Group</i>
10:30am	<b>Mock Interviews with Board Members</b> <i>Cindy Elsbernd, Former Board Member, Des Moines Public Schools</i> <i>Rodney Jordan, Member, School Board, Norfolk Public Schools</i> <i>Kim Martorano, Vice Chair, School Board, Des Moines Public Schools</i>
12:00pm	<b>Lunch</b>
1:00pm	<b>What is Missing Review</b> <i>Dr. Michael Hinojosa, Superintendent-in-Residence, CGCS</i>
1:30pm	<b>Strength Bombardment</b> <i>All Institute Participants</i>
3:30pm	<b>Closure</b>
4:00pm	<b>Adjourn</b>

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**Michael Hinojosa, Ed.D.**  
**Superintendent-in-Residence**  
**Council of the Great City Schools**  
**mhinojosa@cgcs.org**  
**cell 214.986.3978**

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**Michael Casserly, Ph.D.**  
Namesake, Strategic Advisor, former Executive Director  
**Raymond C. Hart, Ph.D.**  
Executive Director  
**Michael Hinojosa, Ed.D.**  
Superintendent-in-Residence

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## Ethics in Leadership

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**Dr. Michael Casserly**

Ethical and Other Dilemmas

**Team 1 : Brickhouse, Dawson, Larsen-Mitchell, Ramirez,**

**Team 2: Border, Moore, Zaid**

**Team 3: Johnson, Segura, Schneider**

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## Ethics in Leadership

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**Dr. Julia Keleher (virtual)**

Former Secretary of Education,  
Puerto Rico Department of Education

**“Mitigating the Risks of Leading Change”**

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## Process Overview



- Dialogue
- One Team Reports, Two Teams Comment
- Superintendent-in-Residence Feedback
- Repeat and Rotate with different team Reporting

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## From Entitlement to Accountability



**Dr. Michael Hinojosa**

Temptation

Transparency

Accept Responsibility

Action Plan

Office of Professional Responsibility

6

## Shadowing Report

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- 3 things you learned
  - 2 things you liked
  - 1 thing you are wondering about
- 

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## Equity Panel

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### **Dr. Jill Baker**

Superintendent, Long Beach Unified School District

### **Dr. Barbara Jenkins**

Retired Superintendent, Orange County Public Schools

### **Dr. Kelvin Adams**

Former Superintendent, St. Louis Public Schools

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## What is Missing?

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**Dr. Michael Hinojosa**

Superintendent-in-Residence, CGCS

**Nominal Group Technique**

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## Introduction Protocol

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TWO Minutes

Past

Present

Future

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## How to get THE job



### **Micah Ali**

Urban Superintendent Talent Recruiter, Hazard, Young, Attea Associates

### **Alton Frailey**

Chief Search Officer, JG Consulting

### **Gary Ray**

President and Chief Executive Officer, GR Recruiting

### **Monica Santana Rosen**

Chief Executive Officer, Alma Advisory Group

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## Mock Interviews



### **Board Members**

Cindy Elsbernd, Des Moines Public Schools (former)

Rodney Jordan, Norfolk Public Schools

Kim Martorano, Des Moines Public Schools

### **Cohort Members**

Brenda Larsen-Mitchell

Harold Border

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## Board Relations

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1. Negotiating Board Member Boundaries
  2. Board Relations including the Team and HR
  3. Managing the Politics
  4. Perceived Effective Communications
  5. Controlling the Narrative
- 

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## 3-2-1

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- 3 things you learned
  - 2 things you liked
  - 1 thing you are wondering about
- 

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# Strength Bombardment

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**Dr. Michael Hinojosa**  
Superintendent-in-Residence, CGCS

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## **GOVERNANCE**



# Governance Services Overview

## January 2024

### Governance Services Goals/Priorities

The goal of the governance services team is to provide training, coaching, and other support regarding effective governance to Council Districts in order to influence their leadership toward improving student outcomes.

The Council's Governance Services team consists of AJ Crabill (Director of Governance), Cindy Elsbernd (Governance Services Manager), and a cadre of coaches and assistant coaches trained in Student Outcomes Focused Governance (SOFG).

### Student Outcomes Focused Governance (SOFG) Coaching

Even though school boards have an inherent desire to see improvements in student outcomes, comprehensive analysis of hundreds of hours of school board meetings from across the nation reveals that few school boards invest a meaningful percentage of their time in behaviors that most correlate with improvements in student outcomes. Simply put, the design of most school board meetings and processes is focused on managing the adult inputs, not governing for student outcomes. In the absence of a coherent framework for what it means to “govern,” school board members often view the school board as being one layer above management. But that is a flawed understanding of governance; in reality the proper alignment of the school board is one layer below the community. This sounds like mere semantics, but the difference in mindset manifests in wildly divergent adult behaviors in the boardroom -- the board positioning itself as inward focused super manager of adult inputs rather than a community vision- and values-focused protector of student outcomes.

This clarifies why 100 years of school board orthodoxy have failed to protect children from unintentional, but very real, educational malpractice. When school boards approach “governing” the way it’s always been done they -- again, typically without intending to -- create school systems where improvements in student outcomes occur either in spite of the school board, or not at all. This norm is deeply ingrained in school board culture nationwide and requires dramatic transformation in adult behavior. But change is often difficult -- particularly for public officials who are often punished for any significant change in direction from the status quo.

This leads to a simple axiom: **student outcomes don't change until adult behaviors change**. Or said differently when placed in the context of governing, patterns of behavior that are exhibited in the boardroom can reasonably be expected to be found paralleled in the classroom. This concept, which offers a summation of the current literature and research on school board behaviors and their relationship to improving student outcomes, is as elegant as it can be confounding.

The intention of **Student Outcomes Focused Governance (SOFG)** is to translate existing research and the collective experience of dozens of board members and superintendents into a governance system that empowers board members and superintendents to confront and overcome common barriers to adult behavior change that could improve student outcomes. Student Outcomes Focused Governance has three components: 1) the [SOFG framework](#) that allows school boards to measure their adult behavior change over time, 2) the SOFG workshop series that orients school boards to the framework, and 3) the SOFG Coach training and certification system that rigorously prepares individuals who will lead the workshops and support the school board's implementation of the framework. All three are necessary for setting school boards on the path to being intensely focused on improving student outcomes.

Districts receiving SOFG coaching support via a professional services agreement (PSA) with the Council include Albuquerque, Anchorage, Atlanta, Aurora, Austin, Buffalo, Charlotte-Mecklenburg, Cincinnati, Cleveland, Clark County, Des Moines, Jefferson County, Sacramento, San Diego, San Francisco, Seattle, and Tulsa.

At least five more Council districts are exploring the implementation of SOFG and considering a PSA with CGCS for coaching support and we continue to provide maintenance support to several districts who have gone through the initial SOFG implementation process.

### **Student Outcomes Focused Governance (SOFG) Cohorts**

Our SOFG Cohorts provide professional development for school board members and district staff to learn about and/or support implementation of the framework. The four 2023 cohorts had participants from 16 member districts and wrapped up in early December.

## 2023 SOFG COHORTS

EFFECTIVE SCHOOL BOARD MEMBER (ESB)	SCHOOL BOARD IMPLEMENTATION (SBI)	STAFF MEMBER IMPLEMENTATION (SMI)	ADVANCED GOVERNANCE & COACHING (AGC)
<p>This cohort provides a community of learning among school board members serving on boards that haven't yet begun or have newly begun the SOFG journey. It allows for participants to learn with and from each other about the basics of effective school board governance and what the continuous improvement journey through SOFG entails.</p>	<p>This cohort provides a community of learning and practice among board members from districts who have been implementing SOFG. Participants have the opportunity to dive deeper into the knowledge, skills, and mindset that are foundational to the adult behavior change that creates the conditions for improving student outcomes.</p>	<p>This cohort provides a community of learning and practice among district professionals who support school boards and superintendents in implementation of effective practices that create the conditions for improving student outcomes.</p> <p>It allows members to share problems of practice with fellow professionals, learn from one another, and explore best practices in a range of areas.</p>	<p>This cohort provides incredibly rigorous, high-level course work designed to prepare participants to guide school boards through SOFG implementation.</p> <p>Its high-performance expectations makes it ideal for individuals who would like to pursue SOFG coaching certification.</p>

There will be three SOFG Cohorts in 2024 with participants from 19 member districts. The cohorts are set to kick off with opening workshops February 9-11 in Louisville, KY.

## 2024 SOFG COHORTS

IMPLEMENTING SOFG BOARD (ISB)	IMPLEMENTING SOFG STAFF (ISS)	ADVANCED GOVERNANCE & COACHING (AGC)
<p>This cohort provides a community of learning and practice among board members from districts who have been implementing SOFG and those who are exploring continuous improvement.</p> <p>Participants have the opportunity to dive deeper into the knowledge, skills, and mindset foundational to the adult behavior change that creates the conditions for improving student outcomes.</p>	<p>This cohort provides a community of learning and practice among district professionals who support school boards and superintendents in implementation of effective practices that create the conditions for improving student outcomes.</p> <p>This community allows members to share problems of practice with fellow professionals, learn from one another, and explore best practices in a range of areas.</p>	<p>This cohort provides incredibly rigorous, high-level course work designed to prepare participants to guide school boards through Student Outcomes Focused Governance (SOFG) implementation.</p> <p>Its high-performance expectations makes it ideal for individuals who would like to pursue SOFG coaching certification.</p>

## Governance Technical/Tactical Support

Technical and tactical support for 2023 to date has been provided for the following districts: Albuquerque Public Schools, Anchorage School District, Arlington Independent School District, Aurora Public Schools, Austin Independent School District, Boston Public Schools, Buffalo Public Schools, Charlotte-Mecklenburg Schools, Cincinnati Public Schools, Clark County School District, Cleveland Metropolitan School District, Columbus City Schools, Des Moines Public Schools, Fayette County Public Schools, Jefferson County Public Schools, Long Beach Unified School District, Pittsburgh Public Schools, Rochester City School District, Sacramento City Unified School District, San Antonio Independent School District, San Diego Unified School District, San Francisco Unified School District, Seattle Public Schools, St. Paul Public Schools, Tulsa Public Schools, and Wichita Public Schools.

This includes support for SOFG implementation as well as providing guidance on any number of governance topics such as superintendent searches, policies and board operating procedures, and others to member districts on an as needed basis.

## Fall Conference Governance Track

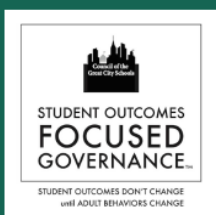
Over the course of the last two Fall Conferences, our team has worked to align a full track of effective governance sessions. At the 2023 Fall Conference, we successfully filled the 2-day breakout schedule which often drew a standing room only crowd.

# "WHAT HAPPENS ON THE DAIS DOESN'T STAY ON THE DAIS"

*Behaviors in the boardroom impact performance in the classroom.*

**School systems exist to improve student outcomes.** How we choose to lead our school systems matters! The Council of the Great City Schools is working with districts and leaders across the nation to adopt practices that create the conditions for improving student outcomes!

School board members, superintendents and the staff who support them are invited to attend our specially curated track of sessions focusing on effectiveness in the boardroom and successfully cascading that effectiveness to the classroom.



Look for the Governance and Leadership Sessions in **Aqua 310B** on Thursday and Friday during the CGCS 67<sup>th</sup> Annual Fall Conference in San Diego, CA.

We look forward to seeing you!



## **Support for Board Roles in the Equity-Centered Pipeline Initiative (ECPI)**

The CGCS team is also supporting the application of the Wallace Foundation Research on Principal Supervision & Support Structures to the work of School Boards. The Council is continuing work with seven ECPI Council districts which began in the last quarter of 2023 to develop plans for each in continued support of their initiatives in strengthening pipelines of equity-focused school leaders beyond their Wallace Foundation grant funding.

We know that much of this work belongs to the superintendent, so this work is focused on drawing from the clear lessons that can be learned from Wallace's principal supervision research regarding how school boards can support pipeline development and maintain an effective governance role.

**HARVARD/CGCS ABC INSTITUTE**

# Council of the Great City Schools Leadership Institute:

*A Harvard Business School Executive Education Program*

*July 16-19, 2023*



# Preliminary Information

Apply by April 21, 2023



HARVARD | BUSINESS | SCHOOL

Executive Education



# Program Overview



## Program Objective

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



## Target Participants

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



## Program Structure and Dates

- 4-day residential program, July 16-19, 2023
- Multiple plenary class sessions
- Daily breakout sessions and team time
- Networking lunches, receptions, and dinners



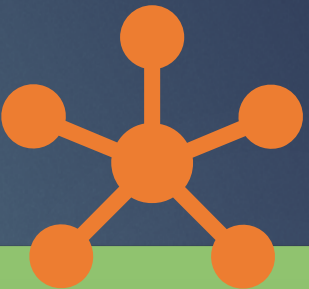
## Program Location

- Harvard Business School Executive Education Complex, Boston, MA

# About the Program

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

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



In addition to classroom sessions, you will experience dedicated small-group sessions to help you develop the skills you need to function better when you return home.

Sessions will use the Student Outcomes Focused Governance Model developed by the Council of the Great City Schools that will leave you with tangible tools for immediately improved governance for your district.





# Program Fees and Benefits

\$4,230 Full Price

\$4,050 Your Cost, with Council Discount and Subsidies



## What does this cover?

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

Three-night single-occupancy bedroom per person

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

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

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

Harvard certificate at the conclusion of the program

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

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

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

HBS tote bag for each participant



Group photo

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

Access to the HBS Working Knowledge site

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



# Program Fees and Benefits

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



- ▶ Participant travel to the Harvard Business School Campus
- ▶ Off-campus lodging before, during, or after the program
- ▶ Transportation from the airport to the Harvard Business School campus
- ▶ All food service and meals not previously stated above
- ▶ Non-standard food or beverage requirements, location changes, or entertainment
- ▶ Costs associated with any medical treatment (including emergency medical transportation) incurred by participants during the program
- ▶ Extra-program costs, outdoor activities, social & cultural events, off-campus meals or special items ordered
- ▶ All incidental charges such as telephone calls, laundry, dry-cleaning, etc.





# How will my board benefit?

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

Increased student  
academic outcomes  
over time

Increased use of board  
time to focus on student  
achievement

Improved relations  
between the board  
and the superintendent,  
leading to stronger  
governance and longer  
superintendent tenure

Better understanding of  
and targeted use of  
evidence and data to  
monitor district progress

Better management of  
conflict

Prioritization of district  
goals over individual  
needs

Enhanced two-way  
communications with  
the community in a way  
that reflects shared  
values



# How to enroll?



Please email Ray Hart, Executive Director of the Council of the Great City Schools, at [rhart@cgcs.org](mailto:rhart@cgcs.org) by close of business April 21, 2023, with the names of board members and superintendents who will attend.



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



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



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

## **MANAGEMENT SERVICES**

## Management Services 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 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.

➤ **Associated Activities:**

- Establish a rolling 3-year calendar for each conference.
- Standardize sponsorship levels and solicit early sponsorship from partner organizations.
- Pursue continuing education credits for participants.
- Syllabus for career tracks
- District participation
  - Work with district leadership in developing conference agendas around issues and topics that are of most interest and benefit to the attendees.

➤ **Chief Finance Officers, Purchasing, Risk Management and Internal Audit Conference, November 6-9, 2023, in Phoenix.**

- **Theme:** Advancing Process Improvement and Automation for Efficient and Effective School Operations
- **Message:** As the challenges facing school districts across the nation continue to mount, it has become increasingly clear that there is an urgent need to find innovative solutions to improve operational efficiency and effectiveness. This year's meeting of Chief Financial Officers, Procurement, Risk Management, and Internal Auditors will focus on advancing process improvement and automation in order to maximize learning outcomes for students in our great city schools. We can address significant staffing shortages for all back-end operations, including finance, procurement, internal audit, and risk management by collaboratively developing strategies to increase efficiencies and focusing on core activities that directly impact the classroom. By leveraging technology and process improvements, we can streamline operations, reduce costs, and ensure that resources are being used in the most effective and impactful way. Ultimately, our goal is to create a more efficient, effective, and sustainable education system that delivers better outcomes for students, teachers, and the broader community.
- **Agenda:** a copy of the agenda can be found [here](#).

- **The Bill Wise Award in Urban Education:** Heather Frederick, Chief Financial Officer at The School District of Palm Beach County, was presented with the Bill Wise Award in Urban Education for her personal commitment to professionalism, leadership, and financial management of the district.



- **The Michael Casserly Urban Executive Leadership Institute:** the Institute is designed for mid-level managers who meet the highest professional standards and have the attributes, if given the opportunity, to assume senior executive positions as Chief Financial Officers and take on the challenges that large urban districts face.





- **Chief Operating Officer “Mini” Conference, November 6-7, 2023, in Phoenix.**
  - **Theme:** Optimizing Educational Infrastructure: Strategies for Efficiency, Collaboration, and Sustainable Investment
  - **Message:** We are thrilled to invite you into crucial discussions and explore innovative approaches to maximize the potential of K-12 facilities. Our theme highlights the pressing need to assess and prioritize the needs of educational infrastructure.
  - **Agenda:** a copy of the agenda can be found [here](#).



**2023 Meeting of Directors, Chiefs of  
Finance, Purchasing, Risk Management,  
and Internal Auditors  
and  
2023 Chief Operating Officers 2-Day  
Convening**





- **Chief Human Resources Officers Conference**
  - **Theme:** Student Outcomes Focused Talent Management
  - **Focus:** Supporting Student Learning through Talent Management, Development, and Support



- **Chief Operating Officers Conference**
  - **Theme:** Student Outcome Focused Operations
  - **Attendees:** This meeting is for Chief Operating Officers, Facilities Directors, Safety and Security Directors, Child Nutrition Directors, and Transportation Directors.



- **Chief Information Officers Conference**



## 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 something exceptionally well
- **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 July 2023 through June 2024**
- Duval County Public Schools Finance – October 2023
  - Cleveland Metropolitan School District Safety – October 2023
  - Anchorage Public Schools – November 2023
  - School District of Philadelphia Transportation – December 2023
  - Cleveland Metropolitan School District IT – February 2024
  - Birmingham City Schools Finance – March 2024
  - Boston Public Schools HR – TBD
- **District Requested Survey July 2023 through December 2023**  
(Attached spreadsheet) [District Surveys](#)

## 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 welcome 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. It is designed for individuals who meet the highest professional standards and have the attributes to assume senior executive positions to take on the challenges that large urban school districts face. There are presently active participants in CFO and CIO tracts.

## Working Groups to Develop Guidelines and Standards

### ➤ Interoperability Cohort Program

The Interoperability Coalition Program was funded with a grant from the Gates, CZI, and Michael and Susan Dell Foundations. ISTE and CCSSO partnered with CGCS in this program. The program was funded for three years and concluded on October 31, 2023. The program focus was to assess the maturity levels in systems and interoperability and data privacy and support the district in their efforts to improve their data governance and management, Edtech procurement policies and practices, governance and project management, and data privacy.

CGCS invited the following 21 member districts to participate in this three-year program.

# 21

School  
Districts  
Serving over

## 2 million

Students

- |                                      |   |
|--------------------------------------|---|
| ● Albuquerque Public Schools         | ● Minneapolis Public Schools              |
| ● Boston Public Schools              | ● Oklahoma City Public Schools            |
| ● Chicago Public Schools             | ● Orange County Public Schools            |
| ● Clark County School District       | ● Philadelphia Public Schools             |
| ● Cleveland Public Schools           | ● Pinellas County Schools                 |
| ● Dallas Independent School District | ● Portland School District                |
| ● Des Moines Public Schools          | ● Rochester Public Schools                |
| ● Fresno Unified School District     | ● Saint Paul Public Schools               |
| ● Hillsborough County                | ● San Antonio Independent School District |
| ● Kansas City Public Schools         | ● Tulsa Public Schools                    |
| ● Metro Nashville Public Schools     |   |

Based on the initial, interim and final assessments the participating districts showed significant progress in the six focus areas.

Domain	Number of Districts Showing Growth EOY 1 Assessment	Percentage of Districts Showing Growth After 1 Year (13 districts reporting)	Number of Districts Showing Growth Final Assessment	Percentage of Districts Showing Growth After 2 Years (16 districts reporting)
Leadership and Vision	8	62%	14	87.5%
Procurement	6	46%	14	87.5%
Governance	12	92%	14	87.5%
Technology and Infrastructure Landscape	7	54%	16	100%
Implementation Fidelity	4	31%	9	56.3%
Privacy	6	46%	10	62.5%

The [final report](#) was shared with the coalition members and program funders. Individual district reports were shared with each district. Dr. Tom Ryan, Shahryar Khazei, Maritess Plewnarz, and Eric Vignola represented CGCS in this program.

### ➤ **K12 AI Readiness**

The Council of Great City Schools (CGCS) and CoSN - the Consortium for School Networking worked in partnership with Amazon Web Services (AWS) developed a K12 Generative AI (Gen AI) [Readiness Checklist](#) Questionnaire. This questionnaire is designed to guide K12 school districts in understanding key factors to consider before implementing Gen AI technologies. While not an exhaustive readiness assessment, the checklist serves as a preliminary tool for district leaders – including superintendents, district leaders and technology experts – to evaluate the safety, privacy, security, and ethical implications of using Gen AI. The goal is to help districts prepare adequately, ensuring data privacy and security, and avoiding bias or algorithmic discrimination, while gaining a foundational understanding of the related tactical considerations.

The K12 Gen AI Readiness Checklist Questionnaire is the first tool that CGCS, CoSN, and AWS are planning to introduce to school districts to help them prepare their organizations for adoption of this transformative technology. Our next phase, which has already been funded and begun, will build upon the foundational considerations outlined in this checklist. We plan to introduce a more comprehensive tool that will allow districts to self-evaluate their readiness for implementing Gen AI technologies. This rubric will help districts identify their maturity level in terms of Gen AI readiness and pinpoint specific areas that require further attention to ensure safe and secure adoption of this transformative technology.

This tool is intended to serve as a starting point for the intelligently and thoughtfully implementing AI technologies that align with instructional and operational objectives. We encourage district leaders to adapt this resource to their unique needs.

### ➤ **Education Sector Government Coordinating Council (GCC)**

At the start of 2023-2024 school year, the U.S. Department of Education (Department) and federal agency partners announced a series of commitments to support K-12 cybersecurity improvements. One of these commitments is the Department's plan to establish an Education

Sector Government Coordinating Council (GCC), a federally recognized coordinating body of governmental entities in the education sector that will voluntarily commit to Department-led coordination and facilitation of information sharing, technical assistance, and guidance to combat K-12 cybersecurity incidents.

Planning session topics will include but not be limited to the following:

- **GCC Membership**
  - Ensuring broad representation
  - Addressing any criteria questions and recommendations
- **Governance Structure Considerations**
  - Consensus and collaboration
  - Situational contingencies, such as recognition and disclosure of limitations imposed by state or local authorities that govern one or more members that prevent them from entering into consensus
  - Actions of individual members may not be binding for the government agency or organization they represent
- **Executive Committee Responsibilities**
  - Meeting location and agenda development
  - Monitoring and closure of issues and initiatives
  - Administrative and meeting support, including logistics and meeting minutes
  - Communications
  - Member and records management
  - Maintenance of Education Facilities Subsector GCC governance documents.
- **Technical Assistance**
  - Target Audience(s)
  - Organizing Structure
- **Federal Partner Collaboration Opportunities**
  - CISA
  - FCC

The following individuals represent CGCS in GCC:

- Willie Burroughs - Director of Management Services, CGCS
- Shahryar Khazei - CIO, Los Angeles Unified School District (retired)
- Don Wolff - CTO, Portland Public Schools
- Mark Racine - CTO, Boston Public Schools

## **MANAGEMENT SERVICES SURVEY REQUESTS**

Date of Request	Requestor	Contact Information	District	Functional Area	Request/Inquiry	Survey Launch
6/29/23	Roderick Richmond	<a href="mailto:richmond9962@bellsouth.net">richmond9962@bellsouth.net</a>	Memphis Shelby County Schools	Facilities	A member district is considering transferring athletic field maintenance from its Facilities Department to its Athletics Department and is interested in learning how other districts are managing these functions. In addition, the requesting district would like to have the supporting job descriptions, essential functions, and scope of work for this role. They are also interested in knowing if the district's athletics department provides centralized support (e.g., scheduling, professional development, regulatory oversight) versus a decentralized model where the athletic director at the school level manages any/all of the aforementioned essential functions.	6/30/23
7/3/23	Sharon Reese	<a href="mailto:sreese2@pps.net">sreese2@pps.net</a>	Portland Public Schools	HR	A member district is trying to determine if there are any council member districts that offer a multilingual stipend or other form of compensation to licensed administrators, particularly principals or vice-principals, for their language skills or use. Portland Public Schools (PPS) offers a multilingual stipend to classified and certified staff who are fluent in a language that 15% or more of the students in their school speak that language. We do not offer one to administrators.	7/5/23
7/3/23	Eugene Baker	<a href="mailto:GBaker@dadeschools.net">GBaker@dadeschools.net</a>	Miami Dade County Schools	IT	A member district is interested in learning what time and attendance system others are using and its impact on the ERP payroll system.	7/5/23
7/7/23	Kathi Hayward	<a href="mailto:haywaka@tulsaschools.org">haywaka@tulsaschools.org</a>	Tulsa Public Schools	Finance	A member district is currently exploring the development of a compensation philosophy statement. They are interested in learning from other districts that have undertaken similar work.	7/10/23
7/20/23	Chris Turner	<a href="mailto:Chris.Turner@WashoeSchools.net">Chris.Turner@WashoeSchools.net</a>	Washoe County School District	IT	We are interested in learning what board policies other districts are developing on artificial intelligence	7/20/23
7/25/23	Luke Newman	<a href="mailto:lnewman3@usd259.net">lnewman3@usd259.net</a>	Wichita Public Schools	Facilities	A member district is in the process of opposing the latest electricity rate increase. In connection with that effort, they are attempting to collect information from other members of CGCS concerning their electrical usage and the rates paid.	7/26/23
7/26/23	Dr. Gabriella Blakey	<a href="mailto:gabriella.blakey@aps.edu">gabriella.blakey@aps.edu</a>	Albuquerque Public Schools	Facilities	A member district is interested in learning what protocols (if any) districts have for monitoring and taking action if indoor/outdoor temperatures are deemed "too hot" or "too cold".	7/27/23
7/27/23	Dr. Kristina Mason	<a href="mailto:Kristina.Mason@WashoeSchools.net">Kristina.Mason@WashoeSchools.net</a>	Washoe County School District	HR	A member district is interested in obtaining exemplars for Executive Leadership (Cabinet/Chief) level positions as they revise and update their compensation for this employee group. The following information is requested: Salary range and schedule; Compensation package to include (benefits, monetary additives, non-monetary additives, other); and Leadership manuals.	7/28/23
11/16/23	Eddie Muns	<a href="mailto:eddie.muns@jefferson.kyschools.us">eddie.muns@jefferson.kyschools.us</a>	Jefferson County Public Schools	Finance	Jefferson County School District is interested in learning how other districts are reporting time and attendance for their employees.	11/21/23

Date of Request	Requestor	Contact Information	District	Functional Area	Request/Inquiry	Survey Launch
11/15/23	Chris Turner	chris.turner@washoeschools.net	Washoe County School District	IT	We are excited by the opportunity to have our I.T. Department audited for structure, efficiency, security, compliance, special projects, staffing, and effectiveness, so I would like to politely request: Any RFP / RFQ you may have used for your own I.T. audit, but particularly Any vendors or consultants that perform K12 I.T. audits If you have examples, please email me directly (chris.turner@washoeschools.net).	11/21/23
11/7/23	Rennette Apodaca	<a href="mailto:rennette.apodaca@aps.edu">rennette.apodaca@aps.edu</a>	Albuquerque Public Schools	Finance	ERP Financial System Survey.	11/28/23
11/28/23	Kathi Hayward	<a href="mailto:haywaka@tulsaschools.org">haywaka@tulsaschools.org</a>	Tulsa Public Schools	Finance	Grant oversight committee survey	12/4/23
12/21/23	Joe Phillips	<a href="mailto:josiah.phillips@browardschools.com">josiah.phillips@browardschools.com</a>	Broward County Public Schools	IT	We are looking into the ACP program for our students. One of the things we are working to determine is to if we need to have an agreement with the ACP vendor or if we can simply communicate to our community that the program exists. Would you be able to survey the Council and see how each district handles this?	1/3/24
12/4/23	Jadine Chou	<a href="mailto:jpchou@cps.edu">jpchou@cps.edu</a>	Chicago Public Schools	Safety	Conduct survey of other districts in determining how resources are allocated	12/21/23

## **ST. LOUIS TRANSPORTATION REVIEW**

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# St. Louis Public School District

## Student Transportation Program Strategic Support Team Overview



Ray Hart, Willie Burroughs, and David Palmer  
January 9, 2024



# Agenda

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- **Overview**
  - **Background**
  - **Commendations**
  - **Findings/Key Areas of Need**
  - **Key Recommendations**
  - **Questions and Answers**
-

# Background

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- All transportation services are outsourced.
- A vendor new to the district was awarded a three-year 276-school bus contract, starting July 1, 2022, and ending June 30, 2025.
- The vendor was also contracted to provide the routing of buses, which the vendor assigned to a third-party using software licenses owned by the district.
- The school bus vendor started the first contract year significantly short of certified school bus drivers, resulting in multiple schools and many students not receiving school bus transportation services for the first few months at the start of the school year.

# Background

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- On average, approximately 8,500 of the 15,500 transportation-eligible students make use of district-provided transportation each day.
- SLPS contracted with two (2) taxicab companies and eleven (11) alternate transportation companies during the first several months of the 2022-2023 school year.
- SLPS uses a modified three-tier bell schedule model for school start and end times (Five different bell schedules). A three-tier system allows buses to be used more effectively as fewer buses are required.

# Commendations



- **Principals:**
  - rated the transportation division staff **highly responsive to concerns**.
  - shared their **appreciation** that school **bus video footage was timely received**.
- District staff interviewed are very committed to meeting the challenge and recognize their role and importance in improving student outcomes.
- **SLPS scored in the "best quartile"** on two (2) 2020-2021 CGCS Managing for Results Transportation Operations Key Performance Indicators (KPIs).

2020-2021 Key Performance Indicator	St. Louis	CGCS Median	Note
Bus Fleet - Daily Buses as Percent of Total Buses	91.08%	81.22%	<b>Best Quartile</b>
Bus Usage - Daily Runs Per Bus	6.2174	4.4604	<b>Best Quartile</b>

# Findings – Leadership and Management

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- DoT internal **staffing levels were inadequate for proper contract administration** and proper oversight monitoring. In particular, the tracking and monitoring of --
  - The **adherence to contractual terms** to ensure that the contractor is fulfilling all contractual obligations (e.g., on-time performance, vehicle standards, pricing);
  - Quality assurance and performance metrics with **regular monitoring and evaluation of the contractor's performance against these metrics** (e.g., timely pickup and delivery, expediting adding new students to buses)
  - **Compliance with legal and regulatory requirements** to verify that the contractor is complying with all applicable laws, regulations, and industry standards, including areas such as occupational health and safety, environmental regulations, licensing, insurance, drug testing, and all other relevant legal obligations;

# Findings – Leadership and Management

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- Contract administration and oversight continued --
    - **Financial and contractual transparency** to closely monitor financial transactions and ensure transparency and accuracy in billing, invoicing, and cost reporting;
    - **Data security**, student information confidentiality, unauthorized access to student data, and data protection protocols are in place;
    - **Performance and compliance for annual evaluation of services** provided to assess the contractor's performance against established criteria; and
    - **Student and bus safety** by verifying the following: daily bus inspection compliance, driver check rides, driver training activities, vehicle maintenance, preventable accident accountability and follow-up, ongoing ridership monitoring to optimize bus routes, and district staff presence at bus stops and school site loading and unloading zones.
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# Findings – Leadership and Management

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- A **potential conflict exists** when the same vendor creates the routes and bills for the number of buses used.
  - The team was told that a **lack of communication exists between the contractor, their staff, and their customers**. For example--
    - The contractually required **call center and call tracking metrics were disbanded**, which has negatively impacted communication, especially timely communication to parents and schools).
    - **Principals** shared that **communication with the vendor was poor**, especially notifications regarding buses that were running late and related information.
    - The team heard from **contractor employees that they do not have a regular meeting cadence** to provide feedback to address service issues and improve service.
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# Findings – Leadership and Management

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- There was no indication that **formal interdepartmental annual route planning meetings existed** that integrated input from essential stakeholder offices (typically Special Education, Student Assignment, Information Technology, McKinney-Vento, Foster Care Services, Communications, Safety and Security, Transportation, Enrollment Planning, School Choice, etc.).
- During a site visit to one of the contractor bus yards, the team observed or was told that --
  - The **vendor was unprepared** (lack of drivers, lack of fleet maintenance staff, and the lack of an appropriate functional garage facility at one of the bus park locations) to take on this contract at the start of the school year and is still not adequately prepared.
  - The **garage was in disarray and appeared unorganized.**





Pictures from SLPS Bus Garage

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Pictures from a Peer District Bus Garage

# Findings – Leadership and Management

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- Site visit observations continued --
    - The **garage lacked critical equipment**, including an adequate number of jacks, jack stands, and air compressor(s) with appropriate capacity.
    - **Attendance among bus drivers was poor**, and drivers were not held accountable for their absences.
    - **Driver training was not well structured** and depended on third-party video training of new drivers vs. hands-on training, and no specific SWD training by appropriate district staff for drivers regarding needs and attitudes towards special needs students took place.
    - The **contractor did not have enough mechanics to maintain all school buses** in a safe and proper mechanical condition - as evidenced by the number of vehicles out of service noted on the dispatch office board as "down" at our visit.
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# Findings – Leadership and Management

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- The district included performance penalties within the school bus vendor contract for crucial service deliverables to ensure that services were performed and maintained at the highest level. However, **performance penalties cannot exceed \$5,000 per calendar month.**
- The team reviewed **extraordinarily high percentages (49.4%) of buses not passing Missouri's annual school bus state inspections** compared to other state and CGCS member districts. The median CGCS 2021 KPI score and Missouri State results for buses that failed inspection on the first inspection is less than 10 percent.
- The team was **unable to verify that cabs and alternative transportation companies had a comprehensive process for training third-party drivers** on SLPS transportation policies and protocols.

# Findings – Organization and Operations

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- The district lacks a **centralized contract compliance office** that is needed for internal control to monitor the management of contracted services. Although the district has a procurement position titled *Contract Compliance Specialist*, per that position summary, this position is responsible for performing contract assignments and procurement procedures, not contract administration and compliance.
- Principals interviewed noted that --
  - Current **contractor leadership never visited their schools**, which hindered relationship-building with the new vendor. Further, **telephone calls go unanswered**, or if they are answered, **call center staff can not assist since the staff "were not properly trained."**
  - Buses are **always late**, and **notifications for late-running buses were effectively nonexistent.**

# Findings – Organization and Operations

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- Principal feedback continued --
    - **Drivers are often no-shows on paydays**, with high driver absences on Mondays, Fridays, and the days before and after holidays.
    - **"We are under more stress due to transportation problems, and parents have shared they are very disappointed in bus service."**
    - **The application that parents use to track the bus was unavailable most of the school year**, and much of the data was incorrect when working.
    - **Field trip confirmations** are not always forwarded to schools
    - Although contractor staff shared that parents and school officials are notified via email of late buses, principals interviewed indicated **they had not received these email notifications.**
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# Findings – Organization and Operations

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- **SLPS DoT staff do not have the same access as the contractor to the GPS software and the Parent Portal Tracker systems, as specified in the contract.**
- The team heard **conflicting information on when new students were placed on a bus.** For example, the Office of Special Education shared that adding a student takes 7 to 14 days. However, principals reported that it's an automatic two (2) weeks, and staff shared that it could be much less depending on when the student registered. Currently, CGCS's KPI for adding an SWD is 4.5 days.
- **Transportation is not present at IEP meetings** when special services, specialized equipment (i.e., wheelchairs, oxygen), or exceptional circumstances (dead-end or one-way street) to ensure the appropriate bus is assigned to meet students' needs the first day transportation is scheduled.



# Findings – Organization and Operations

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- **The DoT lacked a formalized process to monitor and effectively utilize ridership and current bus capacity data** throughout the school year to contain or reduce transportation costs.
- **Routes were built on eligibility rather than average ridership**, resulting in additional and unnecessary buses and costs. The DoT holds seats for 100 percent of the transportation-eligible students, even though historically, at least 25 percent of these students have never or no longer ride the bus.
- **DoT does not follow the best practice of receiving nightly student information system updates** that impact transportation. Currently, the DoT receives only weekly updates.

# Findings – Organization and Operations

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- **On-time school bus arrival last school year was reported in the 85 percent range.** Afternoon on-time departure was approximately 90 percent. These percentages are far below the current combined CGCS median of 99.95 percent on-time performance.
- **SLPS Cost per Bus** (contractor operated) of \$113,230 was significantly higher (97 percent higher) than the CGCS national median of \$57,612.20, and **SLPS Cost per Mile Operated** of \$19.01 was strikingly higher (150 percent higher) than the CGCS national median of \$7.59.

# Recommendations

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- Convene, with a sense of urgency, a **task force with representatives from transportation, procurement, and other offices as appropriate to carefully review all terms and conditions of the current school bus contract.** Identify the specific performance expectations, deliverables, timelines, and any clauses related to non-performance or breach of contract. Develop a comprehensive list of non-compliant issues, their impacts on SLPS and its students, and potential contract amendments to enhance contractor performance..
- Schedule a **meeting with the President/CEO of the current school bus contract company** to discuss the failures SLPS and its students are experiencing and to **implement a performance improvement plan to correct performance failures outlining specific steps and a timeline** to ensure progress toward goals.

# Recommendations

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- **Communicate with stakeholders by informing parents, school administrators, and other relevant stakeholders about the situation** and steps taken to address the bus contractor's performance issues.
  - **Consider conducting a comprehensive staffing study** of the Division of Transportation to ensure that robust contract monitoring and oversight are achievable. Consider creating an SLPS central office function whose primary responsibility is to monitor district contract management, deliverables, compliance, and best practices.
  - Establish an **annual interdepartmental routing timeline committee** that will develop appropriate and acceptable deadlines for the submission of data and completion of tasks. This committee shall comprise staff from Special Education, Student Assignment, Information Technology, McKinney-Vento, Foster Care Services, Enrollment Planning, DoT, and others as appropriate.
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# Recommendations

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- Examine and prepare a **business case justification for bringing the routing function in-house** to improve routing outcomes.
  - Create a **committee comprised of leaders from transportation and the Office of Special Education to confer regularly** on issues of mutual concern. Establish when a transportation representative should be present at an IEP meeting to discuss specialized equipment or services a student requires.
  - Design a strategy to **monitor actual daily ridership** throughout the school year to aggressively identify stops, runs, and buses that can be consolidated or eliminated.
  - Implement programs to **measure customer satisfaction** (customer surveys and focus groups) from parents, students, school administrators, teachers on field trips, athletic directors, and coaches to identify service concerns and establish future priorities.
-

# Thank You Questions and Answers





# **Review of the Student Transportation Program of the St. Louis Public Schools**

## **May 2023**

Square Watson, Deputy Superintendent of Operations for the St. Louis Public Schools (SLPS), requested that the Council of the Great City Schools (CGCS) provide a high-level management review of the district's student transportation program. Specifically, it was requested that the Council<sup>1</sup> --

- Review and comment on existing processes, planning and forecasting, internal controls, contracted services, and identify opportunities for improvement to better position the division moving forward and increase service levels.
- Identify opportunities to increase operational efficiencies, effectiveness, and positive student transportation outcomes.
- Develop recommendations to help the district's transportation operations achieve greater operational efficiencies, effectiveness, and sustainability.

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

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

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

<sup>1</sup> The Council has conducted over 320 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.)

James Beekman  
General Manager, Transportation  
Hillsborough County Public Schools (Florida)

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

Nicole Portee  
Assistant Superintendent, Operation Services  
Charlotte-Mecklenburg Schools (North Carolina)

Shane Searchwell  
Director, Transportation Services  
The School District of Palm Beach County (Florida)

William Wen  
Senior Director, Transportation Services  
Orange County Public Schools (Florida)

The team reviewed documents and data the district provided before a four-day site visit to St. Louis, Missouri, on April 30 to May 1, 2023. The general schedule for the site visit is described below, and the complete working agenda for the site visit is presented in Attachment B.

The team met with the incoming Superintendent, Dr. Keisha Scarlett<sup>2</sup>, and Deputy Superintendent of Operations, Square Watson, during the evening of the first day of the site visit to discuss expectations and objectives for the review and make final adjustments to the work schedule. The team used the second and third days of the site visit to observe operations, conduct interviews with key staff members (a list of individuals interviewed and sites visited 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 Interim Superintendent Dr. Nicole Williams and Deputy Superintendent of Operations Square Watson 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 accuracy of the report and to obtain their concurrence with the final recommendations. This management letter contains the findings and recommendations the team has designed to help

<sup>2</sup> Dr. Scarlett's tenure as superintendent will become effective July 1, 2023.

<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.

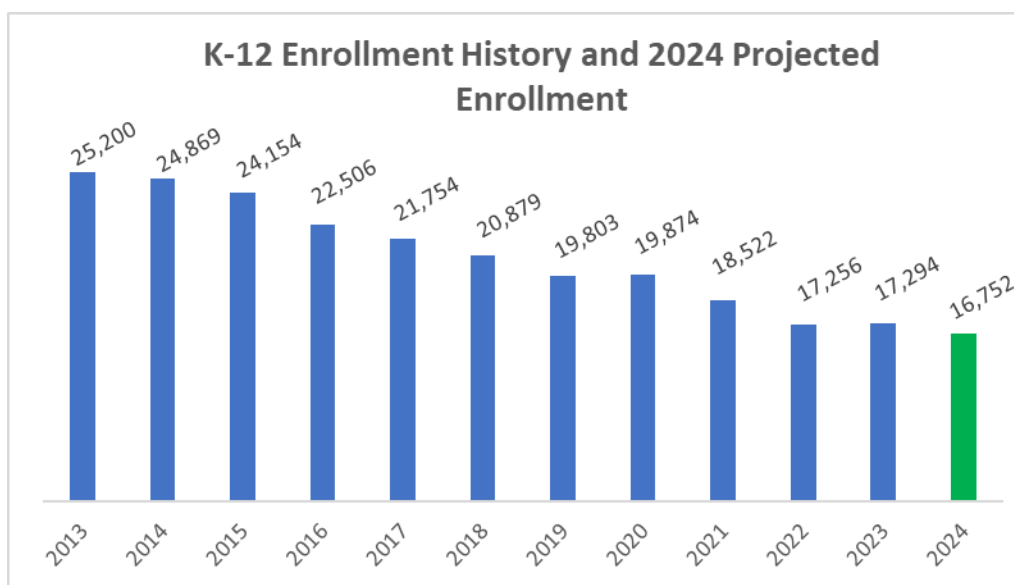
improve the operational efficiencies, effectiveness, and sustainability of the St. Louis Public Schools student transportation program.

## St. Louis Public Schools

The St. Louis Public Schools has a rich 185-year history. The first public school opened in the city of St. Louis in 1838, and by 1860, St. Louis operated 23 elementary schools and a high school, Central High, the first public high school west of the Mississippi River.<sup>4</sup> Today, St. Louis Public Schools operate 68 schools (forty-two (42) elementary, eight (8) middle, twelve (12) high, and six (6) alternative schools), covering a geographic area of 66 square miles.<sup>5</sup>

The district serves a diverse student population of approximately 16,800 students, supported by nearly 4,065 full-time equivalent (FTE) positions, of which approximately 3,000 FTE positions (including 1650 FTE teacher positions) are currently filled. Exhibit 1 below displays 11 years of enrollment history and one year of projected enrollment through FY2024.

### **Exhibit 1. SLPS Enrollment History and 2024 Projected Enrollment**



Source: CGCS, Using Data Provided by St. Louis Public Schools

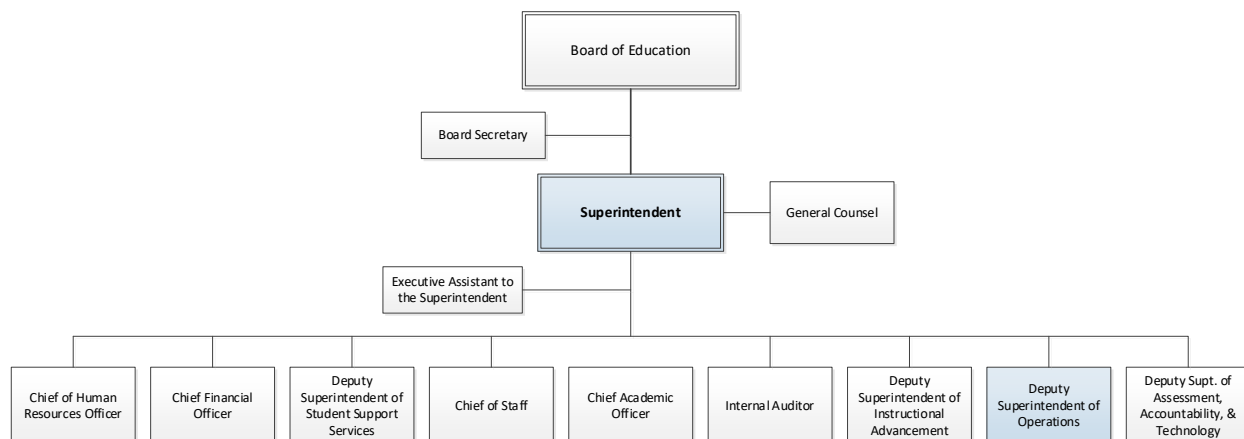
The Board of Education for the St. Louis Public Schools is responsible for the district's governance, policymaking, and oversight. The board is an elected body of seven at-large individuals elected to four-year staggered terms. The board also appoints the Superintendent of Schools, who is responsible to the board for the efficient and effective management and operation of the school system and its resources. Exhibit 2 below displays the organization of the Office of the

<sup>4</sup> Source: <https://aboutstlouis.com/local/history/education-history-st-louis>.

<sup>5</sup> Source: Missouri Department of Elementary and Secondary Education.

Superintendent and the ten direct reports, seven of which are line functions and three that are staff functions.<sup>6</sup>

### **Exhibit 2. Office of the Superintendent Organizational Chart – SY 2018-2019**



Source: CGCS, Using Data Provided by St. Louis Public Schools

The SLPS Mission reads: *We will provide a quality education for all students and enable them to realize their full intellectual potential*, and the SLPS Vision reads: *St. Louis Public Schools is the district of choice for families in the St. Louis region that provides a world-class education and is nationally recognized as a leader in student achievement and teacher quality*.

The SLPS 2022-2023 approved expenditure budget is \$469,236,106.<sup>7</sup> The district is funded by local, federal, state, and county funding.<sup>8</sup>

The Deputy Superintendent of Operations, a direct report to the superintendent, has responsibility for Facilities, Food and Nutrition Services, Real Estate, and Transportation Services. The Deputy Superintendent's organization is shown below in Exhibit 3.

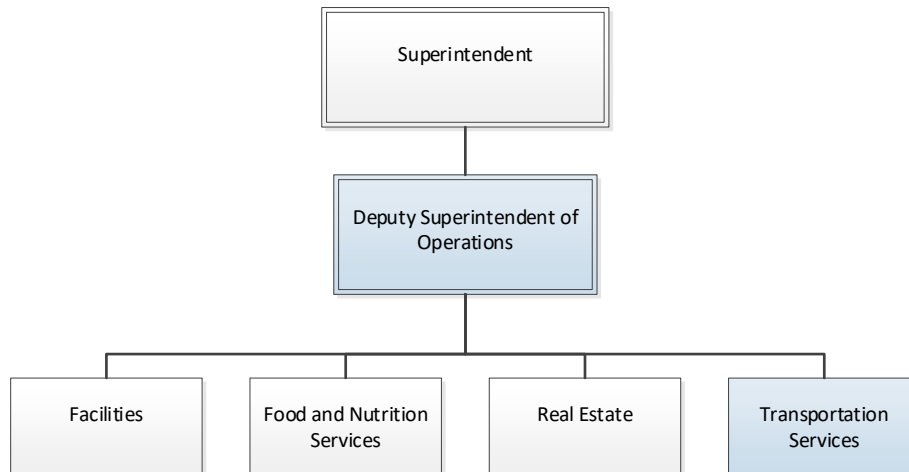
### **Exhibit 3. Deputy Superintendent of Operations Organizational Chart**

<sup>6</sup> A line function or position has authority and responsibility for achieving the major goals of the organization. A staff function or a position whose primary purpose is providing specialized expertise and assistance to line positions.

<sup>7</sup> Source:

[https://www.slps.org/cms/lib/MO01001157/Centricity/Domain/8808/Banks%20Proposed%20FY2024%20Budgets\\_Final.pdf](https://www.slps.org/cms/lib/MO01001157/Centricity/Domain/8808/Banks%20Proposed%20FY2024%20Budgets_Final.pdf).

<sup>8</sup> Source: *Ibid*.

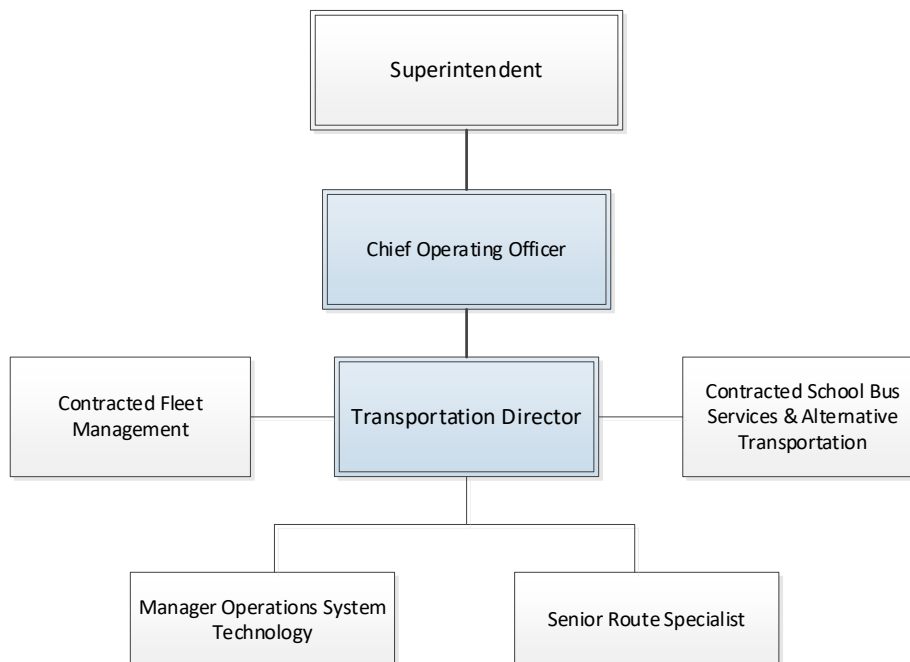


Source: CGCS, Using Data Provided by St. Louis Public Schools

## Division of Transportation

The Director of Transportation leads the Division of Transportation (DoT) and a staff of three (3) district employees, a Manager, Operations Systems Technology, a Senior Route Specialist, and a temporary non-certificated position (not displayed below). The director also oversees contracted bus services, alternative transportation services for students, and contracted fleet management services. Exhibit 4 below presents the division's organizational structure.

### **Exhibit 4. Division of Transportation Organizational Chart**



Source: CGCS, Using Data Provided by St. Louis Public Schools

The Director of Transportation is responsible for the division budget. The FY2023 division budget was \$27,023,506, which is 5.76 percent of the district's overall expenditure budget. Increases in contracted bus services prominently contributed to budget increases in the division. Exhibit 5 below displays the DoT expenditures, by program/fund, for the past four (4) fiscal years.

#### **Exhibit 5. Division of Transportation Comparative Budget Data**

Transportation Division Expenditures by Program/Fund and FY2023 Budgeted and Year to Date Expenditures	FY2020 Expenditures	FY2021 Expenditures	FY2022 Expenditures	FY2023 Budgeted	FY23 Year-to-Date Expenditures
Contracted Transportation Services for Students	\$ 14,636,194	\$ 13,984,526	\$ 17,691,239	\$ 20,686,218	\$ 11,315,862
Contracted K-12 Students with Disabilities Transportation Services	\$ 3,872,998	\$ 5,599,750	\$ 5,293,977	\$ 4,500,000	\$ 3,908,922
Non-Allowable Transportation Expenditures	\$ 313,688	\$ 478,481	\$ 599,391	\$ 400,000	\$ 208,355
Early Childhood Special Education Transportation Services	\$ 1,547,427	\$ 453,244	\$ 1,902,632	\$ 1,435,288	\$ 607,235
School Choice (ESAS)/Prop Share (IDEA) Transportation Costs	\$ 14,167	-	-	\$ 2,000	-
<b>Total</b>	<b>\$ 20,384,474</b>	<b>\$ 20,516,001</b>	<b>\$ 25,487,239</b>	<b>\$ 27,023,506</b>	<b>\$ 16,040,375</b>

Source: CGCS, Using Data Provided by St. Louis Public Schools

Consistent with board policy, SLPS provides transportation to and from school for all students in Pre-kindergarten (PK4) through twelfth grade who reside one (1) mile or more from the school to which they are assigned. Distance is measured by the shortest distance traveled between the home and the school. In addition, students who participate in special programs located away from their local neighborhoods are also eligible to be transported by bus at the superintendent's discretion. Examples include magnet schools, alternative, ELL, and gifted programs.

The district's walk-to-stop distance policy is based on grade level. Specifically, P4 and KG students – closest corner or one block; students in grades 1 through 6 – up to two (2) blocks; and middle school and high school students up to three to four (3-4) blocks.

Transportation from home for a student with a disability otherwise not eligible for transportation or transportation between schools will be provided if the IEP<sup>9</sup> team determines that such transportation is necessary as a related service due to the student's disability.<sup>10</sup> In addition, students in transition (McKinney-Vento) and foster care are also required by statute<sup>11</sup> and are eligible for transportation.

Board policy also requires that a program to acquaint all students with safe riding, loading, unloading, and emergency bus evacuation procedures shall be implemented and continued throughout the year. The superintendent will establish administrative guidelines and regulations to enforce this policy.<sup>12</sup>

All transportation services are outsourced. A vendor new to the district was awarded a three-year 276-school bus contract, starting July 1, 2022, and ending June 30, 2025. After the initial three-

<sup>9</sup> IEP = Individualized Education Program. For additional information, see: <https://www2.ed.gov/parents/needs/speced/iepguide/index.html>.

<sup>10</sup> Source: St. Louis Board of Education Policy P3541.1, at [http://sab.slps.org/Board\\_Education/policies/3541.1.htm](http://sab.slps.org/Board_Education/policies/3541.1.htm).

<sup>11</sup> The McKinney-Vento Homeless Assistance Act was reauthorized by *Every Student Succeeds Act* (ESSA), which was signed into law in December 2015.

<sup>12</sup> Source: St. Louis Board of Education Policy P3541.3.7, at [http://sab.slps.org/Board\\_Education/policies/3541.3.7.htm](http://sab.slps.org/Board_Education/policies/3541.3.7.htm).



year term, the contract may be renewed for two one-year periods. This vendor was also contracted to provide the routing of buses, which the vendor assigned to a third-party using software licenses owned by the district.

Unfortunately, the school bus vendor started this school year significantly short of certified school bus drivers, which resulted in multiple schools and many students not receiving school bus transportation services for the first few months at the start of the school year. On average, approximately 8,500 of the 15,500 transportation-eligible students make use of district-provided transportation each day.

In addition to the school bus contractor, SLPS contracted with two (2) taxicab companies and eleven (11) alternate transportation companies during the first several months of the 2022-2023 school year.

SLPS uses a modified<sup>13</sup> three-tier<sup>14</sup> bell schedule model for school start and end times. A three-tier system allows buses to be used more effectively as fewer buses are required. In addition, each bus can complete multiple assignments in the morning and afternoon, serving different tiers of students at different times of the day. This allows for more efficient use of buses, maximizing the use of resources and thus reducing the number of buses needed, resulting in cost savings.

## **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.

### **Commendations**

- Despite being understaffed, principals rated the transportation division staff highly responsive to concerns brought to their attention.

<sup>13</sup> Modified in that SLPS uses five different bell schedules, not the common three (3) bell schedules with a three-tier system.

<sup>14</sup> Generally, tiering represents assigning schools by level, to separate “tiers.” For example, all middle schools could be assigned to the first tier, all elementary schools to the second tier, and high schools to the third tier. The instructional day for tier-one could start at 7:30 am; tier-two could start at 8:25 am; and tier-three could start at 9:15 am. Buses would pick up and drop off middle school children first (Tier-1) in the morning, then pick up and drop off elementary school students (Tier-2), and then pick up and drop off high school students (Tier-3). A similar approach would be designed for returning students to their home areas after school. Advantages of a three-tier bell schedule may vary depending on the specific circumstances of each school district, such as the size of the student population, geographic layout, and available resources.

- Some Students with Disabilities (SWD) are integrated on school buses with non-SWD, consistent with a Free Appropriate Public Education as required by the Individuals with Disabilities Education Act.<sup>15</sup>
- Principals shared their appreciation that school bus video footage, upon request, was received timely.
- District staff interviewed are very committed to meeting the challenge and recognize their role and importance in improving student outcomes.
- The district requires all contracted buses to be equipped with GPS technology and video cameras.
- The team noted that SLPS scored in the "best quartile" on two (2) 2020-2021 CGCS Managing for Results<sup>16</sup> Transportation Operations Key Performance Indicators (KPI). Exhibit 6 below displays SLPS's best quartile rankings.

**Exhibit 6. Best Quartile Ranking of Transportation Key Performance Indicators**

2020-2021 Key Performance Indicator	St. Louis	CGCS Median	Note
Bus Fleet - Daily Buses as Percent of Total Buses	91.08%	81.22%	Best Quartile
Bus Usage - Daily Runs Per Bus	6.2174	4.4604	Best Quartile

Source: CGCS KPI Project

**Leadership and Management**

- DoT internal staffing levels were inadequate for proper contract administration and proper oversight monitoring. In particular, the tracking and monitoring of --
  - The adherence to contractual terms to ensure that the contractor is fulfilling all contractual obligations, including on-time performance, vehicle standards, pricing, and all other requirements stated in the contract;
  - Quality assurance and performance metrics with regular monitoring and evaluation of the contractor's performance against these metrics, especially the timely pickup and delivery of students and expediting adding new students to buses;

<sup>15</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.

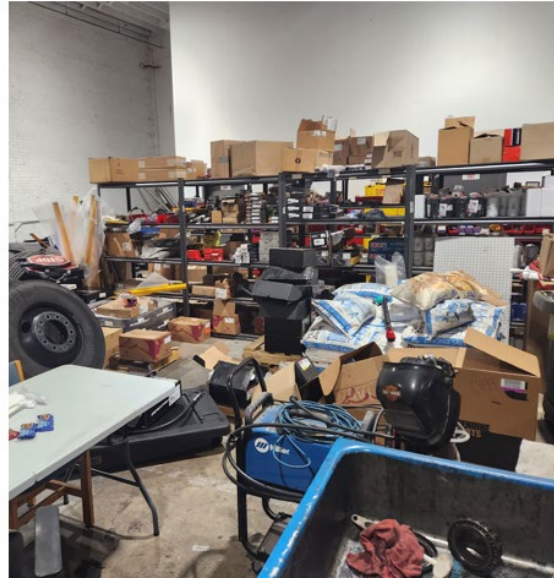
<sup>16</sup> Source: 2020-2021 CGCS *Managing for Results - KPI Report*, published by the Council of the Great City Schools, October 2022.

- Compliance with legal and regulatory requirements to verify that the contractor is complying with all applicable laws, regulations, and industry standards, including areas such as occupational health and safety, environmental regulations, licensing, insurance, drug testing, and all other relevant legal obligations;
- Financial and contractual transparency to closely monitor the contractor's financial transactions and ensure transparency and accuracy in billing, invoicing, and cost reporting;
- Data security, student information confidentiality, unauthorized access to student data, and data protection protocols are in place;
- Performance and compliance for annual evaluation of services provided to assess the contractor's performance against established criteria; and
- Student and bus safety by verifying the following is taking place: daily bus inspection compliance, driver check rides, driver training activities, vehicle maintenance, preventable accident accountability and follow-up, ongoing ridership monitoring to optimize bus routes, and district staff presence at bus stops and school site loading and unloading zones.
- A potential conflict exists when the same vendor creates the routes and bills for the number of buses used. This condition exists with the district's current and perhaps the previous vendor.
- The team was told that a lack of communication exists between the contractor, their staff, and their customers. Specifically --
  - The contractually required call center and call tracking metrics were disbanded, which has negatively impacted communication, especially timely communication to parents and schools;
  - The team was advised that the vendor has assigned a "route specialist" (to address bus stop issues and assign new students to routes) and a "safety officer" (to assist with bus driver issues and to meet with principals regularly to address concerns from each school. However, principals shared that communication with the vendor was poor, especially notifications regarding buses that were running late and related information; and
  - The team also heard from some contractor employees that they, the contractor, do not have a regular meeting cadence to provide feedback or suggestions to address service issues and improve overall student service outcomes.
- The team found no plan to conduct formal surveys or focus groups to gauge customer

(parents, students, school site administrators, teachers) satisfaction with services provided or to identify areas of concern.

- There was no indication that formal interdepartmental annual route planning meetings existed that integrated input from essential stakeholder offices. These offices typically include Special Education, Student Assignment, Information Technology, McKinney-Vento, Foster Care Services, Communications, Safety and Security, Transportation, Enrollment Planning, School Choice, and others as appropriate. As a result --
  - There was no established and agreed-upon annual route planning timeline, which impacted stakeholders helped develop; and
  - There was no agreed-upon final date that critical student data would be sent to transportation to begin summer and fall routing. This data is needed to ensure sufficient time to prepare summer and fall routes that are efficient and cost-effective.
- It was shared that the routing tiers were set too close together, resulting in late-running morning and afternoon buses.
- During a site visit to one of the contractor bus yards, the team observed or was told that --
  - The vendor was unprepared (lack of drivers, lack of fleet maintenance staff, and the lack of an appropriate functional garage facility at one of the bus park locations) to take on this contract at the start of the school year and is still not adequately prepared;
  - Some student transportation into schools did not start until after the second month of school;
  - The garage was in disarray and appeared unorganized, as shown in Exhibit 7 below;

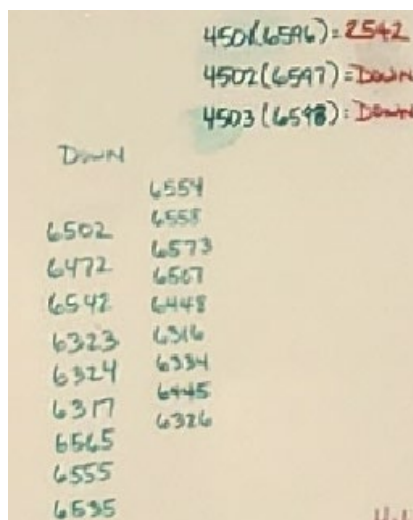
**Exhibit 7. Garage Condition During Site Visit at Bus Park Location**



Source: CGCS Strategic Support Team

- The garage lacked critical equipment, including an adequate number of jacks, jack stands, and air compressor(s) with appropriate capacity;
- Attendance among bus drivers was poor, and drivers were not held accountable for their absences;
- Driver training was not well structured in that the training appeared to depend more on third-party video training of new drivers than hands-on training. In addition, no specific SWD training by appropriate district staff for drivers regarding SWD needs and driver attitude towards special needs students were taking place;
- The contractor is no longer offering signing bonuses as a recruiting incentive;
- There was a lack of training for contracted office staff specific to the GPS software used to monitor bus locations; and
- The contractor did not have enough mechanics to maintain all school buses in a safe and proper mechanical condition, as evidenced by the number of vehicles out of service noted on the dispatch office board as "down" at our visit, as illustrated below in Exhibit 8.

#### **Exhibit 8. Vehicles Out of Service at the Time of the Team Site Visit**



Source: CGCS Strategic Support Team

- The district included performance penalties within the school bus vendor contract<sup>17</sup> for crucial service deliverables to ensure that services were performed and maintained at the highest level. However, performance penalties cannot exceed \$5,000 per calendar month. This low threshold may not be an adequate deterrent for non-performance, nor strong enough to ensure consistent contract deliverables and compliance.
- The team identified or was told of operational weaknesses and other vulnerabilities that could expose the district to unnecessary risk, liability, and the lack of internal controls. To illustrate –
  - The team reviewed extraordinarily high percentages of buses not passing Missouri's annual school bus state inspections compared to other CGCS member districts. The median CGCS 2021 KPI score for buses that *failed* inspection on the first inspection is less than 10 percent. State bus inspection failures can often be attributed to --
    - The age of the school bus fleet;
    - A high bus-per-mechanic ratio;
    - The lack of appropriately equipped garage facilities;
    - The lack of a preventive maintenance program for the bus fleet;
    - The lack of a thorough daily school bus inspection by drivers;
    - A failure of the driver to report mechanical or other safety-related issues;

<sup>17</sup> Contract Service Agreement SLPD and the school bus contract vendor, p.33, paragraph 40.



- Missouri State Highway Patrol (MHP) inspects all school buses annually. Exhibit 9 below shows inspection averages for the past few years, with "Defective" indicating repairs needed, but the bus was not removed from service by the MHP but required re-inspection to verify the correction was satisfactorily completed. "Out of Service" indicates the bus was removed from service by the MHP and required re-inspection before the bus can be returned to service to verify the correction has been satisfactorily completed. Also included in the table below is the SLPS bus vendor's 2023 inspection results. In addition --
  - The current vendor contract states, "The Contractor's bus fleet must achieve at least ninety percent (90%) first-time satisfactory pass during the annual school bus inspections conducted by the Missouri State Highway Patrol;"<sup>18</sup>

**Exhibit 9. Missouri State Highway Patrol School Bus Inspection Statistics**

Year	Buses Inspected	Approved %	Defective %	Out of Service %
2019	11,958	89.3%	8.0%	2.7%
2020	11,828	89.1%	8.7%	2.2%
2021	11,893	90.9%	6.9%	2.2%
2022	11,678	88.7%	8.0%	3.3%
2023	11,464	87.2%	9.5%	3.3%
<b>2023 SLPS</b>	<b>(Approx 250)</b>	<b>50.6%</b>	<b>35.7%</b>	<b>13.6%</b>

Source: CGCS Using Data Provided by the Missouri State Highway Patrol and the SLPS

- The team reviewed SLPD contractor bus inspection data provided by the vendor of their annual Missouri State Highway Patrol Inspections. Exhibit 10 below highlights our findings of the data provided by the vendor;

**Exhibit 10. Missouri State Highway Patrol School Bus Inspection Statistics**

<sup>18</sup> Contract Service Agreement SLPD and the school bus contract vendor, p26, 3, z.

Bus Inspection Notes*	
<ul style="list-style-type: none"> <li>· 294 buses were listed, of which 49 did not show up on either inspection list</li> <li>· 24 buses were listed as re-assigned this summer and not to be replaced</li> <li>· Six buses were listed to be sold this summer</li> <li>· One bus was listed as a total loss on 8/19/22</li> <li>· Five buses were listed on both inspection reports</li> <li>· Bus Counts <ul style="list-style-type: none"> <li>o 294 buses were listed on the inventory provided</li> <li>o 49 buses were not listed on either inspection list</li> <li>o Five buses were listed as inactive, yet four were inspected</li> <li>o 112 buses were listed as inspected at bus lot 1</li> <li>o 141 buses were listed as inspected at bus lot 2</li> </ul> </li> </ul>	
Inspection Results: Percent of Buses Passing First Inspection	
<ul style="list-style-type: none"> <li>· Bus Lot 1 – 80 percent passed (98 buses passed of 112 inspected, 14 failed)</li> <li>· Bus Lot 2 – 43 percent passed (61 buses passed of 141 inspected, 80 failed) <ul style="list-style-type: none"> <li>o 2023 Missouri State Highway Patrol Annual School Bus Inspection state-wide average was 87.2 percent of buses passed the first inspection</li> <li>o CGCS KPI Median – 90.53 percent passed the first inspection</li> </ul> </li> </ul>	
Anomalies	
<ul style="list-style-type: none"> <li>· Five buses were listed on both inspection lists (6327,6329,6393,6405 and 6417)</li> <li>· Lot 2 inspection, bus 6446 was listed three times</li> <li>· Lot 2 inspection, bus 6510 was listed two times</li> <li>· Lot 2 inspection, bus 6522 was listed two times</li> <li>· Lot 2 inspection, two buses were inspected that are not listed on the master list of buses (4501 and 6304)</li> <li>· Bus 6559 was listed as a total loss by fire on 8/19/22, yet it shows that it passed inspection in the bus lot 1 inspection report</li> </ul>	
* Complied by the CGCS Strategic Support Team Using Data Provided by the School Bus Vendor	

Source: CGCS Strategic Support Team Using Data Provided by the Vendor

- The team was unable to verify<sup>19</sup> if the required bus evacuation training was conducted;
- The team was unable to verify that cabs and alternative transportation companies --
  - Had a comprehensive process for training third-party drivers on SLPS transportation policies;
  - That confidential student information protocols were in place;
  - That there was a clear definition of what constituted an accident or incident with SLPS students aboard;

<sup>19</sup> Attempts to verify data and other information in this report generally went unanswered by SLPS staff.

- That minimum age requirements or conditions existed allowing students to ride cabs without parental presence (or other authorized adults) in the vehicle with the student;
- It was unclear if child abuse training was required for all vendor drivers;
- Not requiring a district or DoT-issued picture identification badge (contractor-issued badges are contractually required, but not worn by drivers) verifying that the driver of the contract bus, cab, or van has been background checked, driving record checked, and has received training from appropriate district staff on, at a minimum, --
  - District policies;
  - Accident procedures
  - Incident procedures;
  - Breakdown procedures;
  - Student behavior issue procedures; and
  - Transporting students with disabilities, when applicable.
- Through interviews and data provided by the district, the team identified the following areas of concern regarding contracted school bus, cab, and alternative car and van services --
  - The division lacks a clear process with the vendor to train new hires on district policy;
  - The current school bus service contract contains broad performance penalty language but does not offer performance incentive opportunities. Performance incentive opportunities allow the vendor to recover a portion of the performance penalty damages for superior service;
  - The team was unable to verify if the district paid for cab and van services with controls in place to ensure assigned students were actually transported on the specific days invoiced; and
  - The current school bus services contract does not define what constitutes a bus accident or incident.
- The team found no evidence of a contingency plan for alternative service delivery if the current school bus vendor defaults or experiences significantly high service interruptions.

- After the team's site visit, some SLPS staff did not respond to multiple data and information requests.

## Organization

- The district lacks a *centralized* contract compliance office that is needed for internal control to monitor the management of contracted services. Although the district has a procurement position titled *Contract Compliance Specialist*, per that position summary, this position is responsible for performing contract assignments and procurement procedures, not contract administration and compliance.
- The team noted that the SLPS job descriptions --
  - For Director of Transportation did not include the critical and essential function of managing transportation service contracts; and
  - For Manager, Operations Systems Technology, "geology" was added as an acceptable and related career major for the Bachelor's degree this position required.

## Operations

- Principals interviewed rated this year's transportation services very poor, with an average score of 1.928 out of 5, with 5 being high. Principals shared that --
  - They observed buses with very few students aboard;
  - Current contractor leadership never visited their schools, which hindered relationship-building with the new vendor;
  - Efficiencies could be gained through route consolidation of buses into their schools;
  - They were, and still are, dissatisfied with the current vendor's service; telephone calls went unanswered, or if they were answered, call center staff could not assist since the staff "were not properly trained;"
  - Requested callbacks from the vendor too often did not take place;
  - Buses are always late, and notifications for late-running buses were effectively nonexistent;
  - Drivers are often no-shows on paydays, and high driver absences on Mondays, Fridays, and the days before and after holidays;

- There are fewer bus stops compared with last year, which has negatively impacted student attendance;
  - Principals commented, "We are under more stress due to transportation problems, and parents have shared they are very disappointed in bus service;"
  - More efficient routing could be accomplished by bringing the routing function in-house, as internal staff are more familiar with the community;
  - The application that parents use to track the bus was unavailable most of the school year, and much of the data was incorrect when working. These may be factors as to why less than 20 percent of the parents enrolled in this free service;
  - Parents of eligible students should be able to opt their student in or out for transportation and only route the opted-in students to reduce the number of buses needed;
  - Drivers do not answer their radios for fear that they may be asked to work longer and transport students they are not familiar with;
  - Field trip confirmations are not always forwarded to schools; and
  - They (principals) want to improve transportation services to their schools and be at the table involved in finding solutions.
- The district and the contractor were not maximizing the district's field trip tracking software functionality. As a result, there was decreased communication with parents and schools and increased manual data entry.
  - SLPS DoT staff do not have the same access as the contractor to the GPS software and the Parent Portal Tracker systems. as specified in the contract.<sup>20</sup>
  - The team heard conflicting information on when new students were placed on a bus. For example, the Office of Special Education shared that adding a student takes 7 to 14 days. However, principals reported that it's an automatic two (2) weeks, and staff shared that it could be much less depending on when the student registered. Currently, CGCS's KPI for adding an SWD is 4.5 days.
  - Transportation is not present at IEP meetings when special services, specialized equipment (i.e., wheelchairs, oxygen), or exceptional circumstances (dead-end or one-way street) to

<sup>20</sup> Contract Service Agreement SLPD and the school bus contract vendor, p.15, c.

ensure the appropriate bus is assigned to meet students' needs the first day transportation is scheduled.

- The DoT lacked a formalized process to monitor and effectively utilize ridership and current bus capacity data throughout the school year to contain or reduce transportation costs. To illustrate --
  - Other than the data collected for the state reports, the team found little evidence that actual daily ridership data were monitored or reviewed throughout the school year to identify opportunities for consolidating runs and routes, eliminating buses, eliminating stops, or equalizing loads; and
  - Transportation relies on self-reporting by drivers to determine when stops should be eliminated and the names and number of students no longer riding the bus. This methodology becomes a disincentive to drivers to accurately report ridership numbers and stop counts in fear of having their paid time reduced or losing their preferred route assignment.
- Routes were built on eligibility rather than average ridership, resulting in additional and unnecessary buses and costs. The DoT holds seats for 100 percent of the transportation-eligible students, even though historically, at least 25 percent of these students have never or no longer ride the bus.
- DoT does not follow the best practice of receiving nightly student information system updates that impact transportation. Currently, the DoT receives only weekly updates.
- On-time school bus arrival this school year was in the 85 percent range. Afternoon on-time departure was approximately 90 percent. These percentages are far below the current combined CGCS median of 99.95 percent on-time performance.
- Operational weaknesses, safety concerns, and other vulnerabilities that negatively impacted positive student outcomes existed. Specifically--
  - Students faced long wait times at bus stops for transportation services;
  - Students have lost critical instructional time and other compensatory education services due to unreliable transportation services; and
  - Parents have told school site administrators they risk losing their job because buses are late, and they must transport their children to or from school, arriving late or leaving early from work.
- Although contractor staff shared that parents and school officials are notified via email of late buses, principals interviewed indicated they had not received these email notifications.



- Exhibit 11 below compares SLPS self-reported transportation operations data with CGCS national median scores for its member districts.<sup>21</sup> The exhibit also notes whether SLPS scored in the best or worst quartile among all CGCS reporting districts.<sup>22</sup> Noteworthy SLPS self-reported KPI comparative cost data<sup>23</sup> indicated that --
  - SLPS Cost per Bus (contractor operated) of \$113,230 was significantly higher (97 percent higher) than the CGCS national median of \$57,612.20;
  - SLPS Cost per Mile Operated of \$19.01 was strikingly higher (150 percent higher) than the CGCS national median of \$7.59; and
  - Note: NDS indicates No Data Submitted.

### **Exhibit 11. SLPS Transportation KPI's**

<sup>21</sup> Source: 2020-2021 CGCS *Managing for Results - KPI Report*, published by the Council of the Great City Schools, October 2022.

<sup>22</sup> Not all KPIs have associated quartile rankings.

<sup>23</sup> Team requests to verify SLPS self reported data went unanswered.

2020-2021 Key Performance Indicator	St. Louis	CGCS Median	Note
Accidents - Miles Between Accidents (Contractor-Operated)	68,507.60	49,508.55	
Accidents - Miles Between Preventable Accidents (Contractor-Operate	205,523.00	205,523.00	
Bus Equipment - AVL/GPS Links To Routing Software	100%	96.08%	
Bus Equipment - GPS Tracking	100%	96.74%	
Bus Equipment - Rider Harnesses, Lap	12.21%	33.93%	
Bus Equipment - Rider Harnesses, Lap-And-Shoulder	2.90%	29.79%	
Bus Equipment - Student Tracking Systems	NDS	90.92%	
Bus Equipment - Video Cameras	100%	95.86%	
Bus Fleet - Alternatively-Fueled Buses	NDS	17.22%	
Bus Fleet - Average Age Of Fleet	NDS	8.69	
Bus Fleet - Daily Buses as Percent of Total Buses	91.08%	81.22%	Best Quartile
Bus Fleet - Maintenance Hours Per Bus	NDS	66.7667	
Bus Fleet - Percent Contractor-Operated	100%	45.92%	
Bus Fleet In Service Daily	NDS	98.59%	
Bus Inspections - Percent Passed On First Try	NDS	90.53%	
Bus Usage - Daily Runs Per Bus	6.2174	4.4604	Best Quartile
Bus Usage - Daily Seat Utilization (Contractor-Operated)	1.1233	0.4941	
Bus Usage - Live Miles Per Deadhead Mile (Contractor-Operated)	8.8168	1.8732	
Bus Usage - Miles Per Bus (Contractor-Operated)	5,426.35	5,829.93	
Contract Buses - Percent Of Ridership	99.13%	34.24%	
Cost Per Bus	\$103,140	\$62,305.20	Worst Quartile
Cost Per Bus (Contractor-Operated)	\$113,230	\$57,612.20	Lower is Better
Cost Per Mile Operated	\$19.01	\$7.59	Worst Quartile
Cost Per Rider	\$1,944.10	\$1,627.96	Lower is Better
Cost per Rider (Yellow Bus Only)	\$ 2,018.83	\$ 1,741.56	
Daily Ride Time - General Education	35	30	
Daily Ride Time - SWD Students	45	35	Worst Quartile
Daily Ride Time, Maximum Allowed - General Education	60	57.5	
Daily Ride Time, Maximum Allowed - SWD Students	60	57.5	
Fuel Cost As Percent Of Retail - Bio-Diesel	NDS	81.82%	
Fuel Cost As Percent Of Retail - Diesel	NDS	85.32%	
Fuel Cost As Percent Of Retail - Gasoline	NDS	82.19%	
Fuel Cost As Percent Of Retail - Propane	NDS	80.68%	
Participation Rate - Alternative Transit	NDS	0.5185%	
Participation Rate - Any Transportation Service	NDS	23.73%	
Participation Rate - Yellow Bus Service	NDS	20.09%	
Personnel - Buses per Mechanic	NDS	20.93%	
Public Transit - Pass/Token Cost As Percent Of Retail	NDS	76.79%	
Public Transit - Percent Of Ridership	1.52%	4.49%	
Students With Disabilities - Percent Of Ridership	5.09%	8.33%	
Students With Disabilities - Students On Dedicated SWD Buses	99.39%	90.26%	
Students With Disabilities - Students With Neighborhood Pickup	12.21%	17.97%	
Turn Time To Place New Students - General Education	NDS	3	
Turn Time To Place New Students - Students with Disabilities	5	4.5	

Source: CGCS KPI Project

## Recommendations

The CGCS Strategic Support Team has developed the following recommendations<sup>24</sup> to help improve the effectiveness and efficiency of the St. Louis Public Schools Division of Transportation.

1. Convene, with a sense of urgency, a task force with representatives from transportation, procurement, and other offices as appropriate to carefully review all terms and conditions of the current school bus contract. Identify the specific performance expectations, deliverables, timelines, and any clauses related to non-performance or breach of contract. Develop a comprehensive list of non-compliant issues, their impacts on SLPS and its students, and potential contract amendments to enhance contractor performance.
2. Schedule a meeting with the President/CEO of the current school bus contract company to discuss the failures SLPS and its students are experiencing. This meeting should include appropriate SLPS legal staff, the SLPS Deputy Superintendent of Operations, SLPS procurement and transportation staff, and other SLPS staff as appropriate. The purpose of the meeting is to --
  - a. Determine why the vendor failed to serve SLPS and its students appropriately;
  - b. Identify all failures of service delivery and contract compliance;
  - c. Determine whether the vendor is committed to dedicating all needed resources to ensure their meeting SLPS needs and expectations as required in the contract;
  - d. Request a performance improvement plan to correct performance failures. This plan should outline specific steps they will take to address the problems, jointly creating a timeline for correcting service issues and any other measures implemented to ensure satisfactory performance moving forward;
  - e. Consider consequences for failure to complete the corrective action within the agreed-upon timeframes;
  - f. Closely monitor the agreed-upon timeline to ensure that timely corrective action is taking place; and
  - g. Consider communicating with stakeholders by informing parents, school administrators, and other relevant stakeholders about the situation and steps taken to address the bus contractor's performance issues. Transparent communication helps manage expectations and maintain or reestablish trust in the transportation system.

<sup>24</sup> Recommendations are not listed in any specific order or priority.

3. Invest in a comprehensive staffing study of the Division of Transportation to ensure that robust contract monitoring and oversight are achievable. Multiple staff members may need to be added to the division. Perform an analysis to determine the ongoing financial requirements for added positions. As previously noted, critical areas to be closely monitored must include --
  - a. Adherence to ensure that all contractual obligations, including on-time performance, vehicle standards, pricing, and all other requirements stated in the contract;
  - b. Regular monitoring and evaluation of the contractor's performance against quality assurance and performance metrics, with a particular focus on on-time performance and expediting the adding of new students to buses;
  - c. Verifying contractor compliance with legal and regulatory requirements, applicable laws, regulations, and industry standards. This compliance includes occupational health and safety, environmental regulations, licensing, insurance, drug testing, and all other applicable legal obligations;
  - d. Financial and contractual transparency to closely monitor the contractor's financial transactions, accuracy in billing, invoicing, and cost reporting;
  - e. Ensuring data security, student information confidentiality, unauthorized access to student data, and adherence to data protection protocols are in place;
  - f. Annual written assessments and evaluation of contractor performance and compliance measured against established contract performance language;
  - g. Student and bus safety by verifying the following is taking place: daily bus inspection compliance, driver check rides, driver training activities, vehicle maintenance, preventable accident accountability and follow-up, ongoing ridership monitoring to optimize bus routes, and district staff presence at bus stops and school site loading and unloading zones.
4. Examine and prepare a business case justification for bringing the routing function in-house to improve the following routing outcomes --
  - a. Better route planning with increased control of the process;
  - b. Improved communication and responsiveness to stakeholders, including providing school staff access to student routing information;
  - c. Reduce the time to add students to buses by requiring nightly transportation updates instead of the current weekly update cycle, with the goal of meeting or exceeding the CGCS KPI for adding new students to buses;

- d. Better integration and coordination opportunities with school operations;
  - e. Validating tier spacing as appropriate;
  - f. Improved data analysis and decision-making to improve efficiency and costs; and
  - g. Eliminating the conflict where the vendor is responsible for routing and determining the number of buses needed or used.
5. Explore the benefits of incorporating performance incentives or recouping some portion of the performance penalties in contracted services as a motivator for sustained exceptional service.
  6. Establish an annual interdepartmental routing timeline committee that will develop appropriate and acceptable deadlines for the submission of data and completion of tasks. This committee shall comprise key staff from Special Education, Student Assignment, Information Technology, McKinney-Vento, Foster Care Services, Enrollment Planning, DoT, and others as appropriate. The committee shall ensure that –
    - a. Routing staff has sufficient time to prepare summer and fall runs<sup>25</sup> and routes that are efficient and cost-effective;
    - b. The timeline includes contractor meetings to ensure the vendor has adequate time for recruiting/hiring/training drivers and monitors, reviewing contractor backgrounds and driving records, dry run(s), and vehicle maintenance in preparation for the start of the school year;
    - c. An agreed-upon cutoff date for finalizing routes is enforced before the opening of school;
    - d. Student routing information provided to school sites before the opening of school is available or received timely and presented in a clear and logical format;
    - e. Use the previous school year's ending routing configuration to the greatest extent possible as the starting point for the following 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, or consider an opting-in/out platform where parents of eligible students opt their student in or out for transportation and only route the opted-in students to reduce the number of buses needed;

<sup>25</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. 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, cabs, and alternative vehicles used;
  - g. Require transportation policy "exceptions" be reviewed and renewed annually and approved by the superintendent or designee;
  - h. Provide current and possible future routing staff refresher and optimization training of the district's routing software;
  - i. Develop routing simulations and optimizations utilizing a test database to identify potential efficiencies in advance of and throughout the routing process;
  - j. Integrate, to the greatest extent possible, students from all transportation programs on the same buses, including, as appropriate, Students with Disabilities; and
  - k. Create a quality control review process that will ensure, before implementation, all runs, routes, and tiers are evaluated as viable, efficient, and within guidelines. Adjust routes as necessary before deploying.
7. Design a strategy to monitor actual daily ridership throughout the school year to aggressively identify stops, runs, and buses that can be consolidated or eliminated.
  8. Develop succession planning and cross-training within the DoT to ensure knowledge transfer and the orderly transition of responsibilities.
  9. Create a committee comprised of leaders from transportation and the Office of Special Education to confer regularly 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. Identifying opportunities to incorporate *least restrictive environment* whenever possible by --
      - i. Identifying students that can be integrated on buses with their non-disabled peers; and
      - ii. Designing runs that will safely accommodate both corner and door-to-door stops.
  10. Develop strategies to address concerns identified in this management letter, including --
    - a. Ensuring that --



- i. Students are picked up and delivered timely, and parents and schools are promptly and timely notified of interruptions of service;
    - ii. Students with Disabilities receive services based on their IEP;
  - b. Developing transportation continuity plans in the event the current service provider is unable to sustain required service levels;
  - c. Establishing minimum age requirements or conditions allowing students to ride cabs without parental (or other authorized adults) presence in the cab with the student;
  - d. Requiring district or DoT-issued *picture* identification badges (in place of contractor-issued badges) verifying that the driver of the contract bus, cab, or van has been background checked, driving record checked, and has received training from appropriate district staff on, at a minimum, --
    - i. District policies;
    - ii. Accident procedures;
    - iii. Incident procedures;
    - iv. Breakdown procedures; and
    - v. Transportation-related student behavior issues.
11. Enhance contract administration by creating an SLPS central office function whose primary responsibility is to monitor district contract management, deliverables, compliance, and best practices. This office will be responsible to --
- a. Make contract oversight and enforcement a district-wide priority;
  - b. Ensure consistent interpretation and application of contract terms and conditions across the district;
  - c. Establish uniformity in contract management practices, reducing the risk of inconsistencies or misunderstandings that can arise when multiple individuals or departments handle contracts independently;
  - d. Develop training for key staff in contract administration and best practices;
  - e. Design and monitor performance indicators to ensure vendor compliance to all terms, conditions, and damage clauses agreed to by the parties; and
  - f. Ensure Vendor Performance Evaluations are written and issued regularly, maintained in a

centralized location, and used as a factor in allowing vendors to bid on future contracts.

12. 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 parents, students, school administrators, teachers on field trips, athletic directors, and coaches must be solicited.

## ATTACHMENT A. STRATEGIC SUPPORT TEAM

### Willie Burroughs

**Willie Burroughs**, a veteran school business official is Director of Management Services for the Council of the Great City Schools. In this position, he conducts strategic support teams and manage operational reviews for superintendents and senior managers; convenes 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 of Transportation (retired), Los Angeles Unified School District, is a forty-year veteran of the school bus industry. Mr. Palmer's executive responsibilities included managing bus operations (transporting over 75,000 students on 2,500 school buses into over 850 schools and centers), fleet maintenance (3,300+ vehicles), strategic planning and execution, budget development and oversight, and contract administration. In addition, Mr. Palmer oversaw the design and implementation of department staff performance standards, benchmarks, and accountabilities and advised the Council of Great City Schools on the *Key Performance Indicator* project. Mr. Palmer also instructed the transportation component 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 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 many management and operational reviews.

### James Beekman

**James Beekman** is the General Manager of Transportation for Hillsborough County (Florida) Public Schools (HCPS). HCPS is currently the 7th 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 has served 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.

### **Shane Searchwell**

**Shane Searchwell** is dedicated to the mission of partnering with schools, families, and communities to provide safe and efficient transportation in support of school programs and services. Mr. Searchwell has actively served the Palm Beach County School District and the Transportation department for the past 16 years. The School District of Palm Beach County is the tenth largest district in the nation and the fifth largest in the State of Florida serving more than 189,000 students. Over the 16-year time span he has served the department in the capacity of various leadership roles inclusive of the department's Accountant, Area Manager, General Manager and has been the Department Director since August of 2018. Mr. Searchwell leads a team of over 1,200 employees located across six transportation facilities with buses traveling across 2,386 square miles each day to include over 18,624 bus stops; making the total miles driven over 13.2 million per year. Mr. Searchwell is a member of the National Association of Pupil Transportation and currently serves as the Region I Director for the Florida Association of Pupil Transportation. He is a proud graduate of Florida Atlantic University with a Bachelor of Science in Accounting. Mr. Searchwell is committed to the success and excellence of every student in the district and is passionately driven by the vision of "Kids First...Education Begins with Transportation".

### **William Wen**

**William Wen** currently serves as the Senior Director of Transportation Services for Orange County Public Schools (OCPS) in Orlando, Florida. OCPS is the 8th largest school district in the nation (4th largest in Florida) transporting approximately 56,000 students. OCPS operates just over 540 buses daily traveling over 13 million miles per year. Mr. Wen has been involved in passenger transportation for over 45 years, including fixed route service, transit contracting, charter/sightseeing, para-transit, and pupil transportation with OCPS for the last 18 years. During the course of his transportation career, he has served as a Bus Operator, Radio Dispatcher, Road Supervisor, Safety and Training Manager, Security Officer, ESF-1 representative at the Orange County Emergency Operations Center, and Area Operations Manager. He was also a member of the Traffic Safety Department of the AAA National Office where he worked on driver safety education and child passenger safety programs. He is a graduate of the University of Maryland, University College with a MS in Applied Management.



# Council of the Great City Schools

THE NATION'S VOICE FOR URBAN EDUCATION

## Strategic Support/Technical Assistance Team

St. Louis Public Schools  
801 N. 11<sup>th</sup> Street I  
Transportation Review  
April 30 – May 3, 2023

### Working Agenda

Subject to Change as Required

**Transportation:**

**Audio/Visual Instructions:**

Day 1   Sunday April 30, 2023		
Time		Participant(s)
6:00 p.m.	<b>Team to Meet in Hotel Lobby:</b> <a href="#">Courtyard by Marriott St. Louis Downtown</a> 823-827 Washington Ave (314) 231-7560	SST Members
6:30 p.m.	<b>Kickoff Dinner Meeting:</b> <a href="#">Polite Society</a> 1923 Park Avenue	Attendees:  <b>Dr. Nicole Williams</b> <i>Interim Superintendent, St. Louis Public Schools</i> <b>Square Watson</b> <i>Deputy Superintendent, Operations, St. Louis Public Schools</i> <b>Willie Burroughs</b> <i>Director of Management Services, Council of the Great City Schools CGCS</i> <b>Jim Beekman</b> <i>General Manager of Transportation, Hillsborough County Public Schools</i> <b>Nathan Graf</b>



		<i>Senior Executive Director of Transportation and Vehicle Maintenance, San Antonio Independent School District</i> <b>David Palmer</b> <i>Deputy Director, Transportation (retired), Los Angeles Unified School District</i> <b>Shane Searchwell</b> <i>Director, Transportation Services, The School District of Palm Beach County</i> <b>Bill Wen</b> <i>Senior Director, Transportation Services, Orange County Public Schools</i> <b>Others (TBD)</b>
<b>Day 2   Monday May 1, 2023</b>		
<b>Time</b>		<b>Participant(s)</b>
7:00a.m. – 7:45 a.m.	Team Continental Breakfast	SST Members
8:00 a.m. – 9:30 a.m.	Team working Session	SST Members
9:45 a.m. – 10:45 a.m.	Team Interviews	<b>Square Watson</b> <i>Deputy Superintendent, Operations</i> <b>Jerranetta Brookings</b> <i>Manager, Operations</i>
11:00 a.m. – 11:45 a.m.	Team Interviews	<b>Toyin Akinola</b> <i>Director of Transportation</i> <b>Jamel Wren</b> <i>Manager, Operations Systems</i> <b>Renaye Stepney</b> <i>Senior Route Specialist</i>
<b>12:00 p.m. – 1:00 p.m. Working Luncheon</b>		
1:00 p.m. – 2:00 p.m.	Team Interviews	<b>Scott Allen</b> <i>Gateway Region Operations Manager</i> <b>Jeff Sherman</b> <i>District Manager</i>
2:15 p.m. – 3:00 p.m.	Team Interview	<b>Candace Boyd</b> <i>Director, Special Education</i>
3:15 p.m. – 4:00 p.m.	Team Interviews	<b>Felicia Isbell</b> <i>Manager, Spring</i> <b>LaTona Brassfield</b> <i>Manager-North</i>
4:15 p.m. – 5:00 p.m.	Team Interviews	<b>Angie Banks</b> <i>Chief Financial Officer</i> <b>Stephanie Piatt</b> <i>Interim, Director of Procurement</i> <b>Charles Ellis</b> <i>Fiscal Control Officer</i>
<b>5:30 p.m. Team Discussion of Work Plan for Balance of Site Visit</b>		

Team Departure		
Day 3   Tuesday May 2, 2023		
Time		Participant(s)
7:00 a.m. – 7:45 a.m.	Team Continental Breakfast	SST Members
8:00 a.m. – 8:45 a.m.	Team Interviews	<b>Mike Nolte</b> <i>Region Maintenance</i>  <i>District Fleet Maintenance</i>
9:00 a.m. – 10:00 a.m.	Team Interviews	<b>Victor Williams</b> <i>Dispatcher North Garage</i> <b>Deidre Chatman</b> <i>Dispatcher South Garage</i>
10:00 a.m. – 10:45 a.m.	Team Interviews	<b>Jeff Wood</b> <i>Region Safety Manager</i> <b>Kelly Shore</b> <i>District Safety Manager</i>
11:00 a.m. – 12:00 a.m.	Team Interview	<b>Kenshiea Fuller</b> <i>Logistics</i>
12:00 p.m. – 1:00 p.m. Working Luncheon		
1:00 p.m. – 1:45 p.m.	Team Interview	<b>Anna Toyes</b> <i>Contract Financial Manager</i>
2:00 p.m. – 2:45 p.m.	Team Interview	<b>Dione Joyner</b> <i>District HR Manager</i>
3:00 p.m. – 4:30 p.m.	Team Interviews	<b>Principals</b> <b>Ms. Yvette Levy, Wilkinson</b> <i>Elementary</i> <b>Dr. Belinda Quimby, Humboldt</b> <i>Elementary</i> <b>Dr. Shameika Humphrey, Peabody</b> <i>Elementary</i> <b>Dr. Tyler Archer, Nance Elementary</b> <b>Mr. Robert Lescher, Busch Middle</b> <b>Dr. Dianne Berendzen, Nahed</b> <i>Chapman (K-8)</i> <b>Dr. Benecia Nanez-Hunt, Long</b> <i>Middle</i> <b>Dr. Darwin Young, Carr Lane Middle</b> <b>Dr. Tina Hamilton, Metro High</b> <b>Mr. Frederick Steele, Collegiate</b> <i>High</i> <b>Dr. Sean Nichols, Sumner High</b> <b>Dr. Brenda Smith, Vashon High</b>
Team Discussion of Work Plan for Balance of Site Visit		

Day 4   Wednesday May 3, 2023		
Time		Participant(s)
7:00 a.m. – 7:30 a.m.	Team Continental Breakfast	SST Members
7:30 a.m. – 12:00 p.m.	Team Working Session	Synthesis of Findings & Recommendations
12:00 p.m. – 1:00 p.m.	Working Luncheon & Debriefing TBD	<b>Dr. Nicole Williams</b> <i>Interim Superintendent</i> <b>Square Watson</b> <i>Deputy Superintendent, Operations</i> <b>Other (TBD)</b>
1:00 p.m. Adjournment & Departures		

## ATTACHMENT C. DISTRICT PERSONNEL INTERVIEWED

- Square Watson, Deputy Superintendent, Operations
- Jerranetta Brookings, Manager, Operations
- Toyin Akinola, Director of Transportation
- Jamel Wren, Manager, Operations Systems
- Renaye Stephney, Senior Route Specialist
- Scott Allen, Gateway Region Operations Manager
- Jeff Sherman, District Manager
- Candace Boyd, Director, Special Education
- Felicia Isbell, Manager, Spring
- Angie Banks, Chief Financial Officer
- Stephanie Piatt, Interim, Director of Procurement
- Charles Ellis, Fiscal Control Officer
- Victor Williams, Dispatcher North Garage
- Deidre Chatman, Dispatcher South Garage
- Jeff Wood, Region Safety Manager
- Kelly Shore, District Safety Manager
- Kenshiea Fuller, Logistics
- Anna Toyes, Contract Financial Manager
- Dione Joyner, District HR Manager
- Invited Principals:
  - Ms. Yvette Levy, Wilkinson Elementary
  - Dr. Belinda Quimby, Humboldt Elementary
  - Dr. Shameika Humphrey, Peabody Elementary
  - Dr. Tyler Archer, Nance Elementary
  - Mr. Robert Lescher, Busch Middle School
  - Dr. Dianne Berendzen, Nahed Chapman (K-8)
  - Dr. Benecia Nanez-Hunt, Long Middle School
  - Dr. Darwin Young, Carr Lane Middle School
  - Dr. Tina Hamilton, Metro High School
  - Mr. Frederick Steele, Collegiate High School
  - Dr. Sean Nichols, Summer High School
  - Dr. Brenda Smith, Vashon High School

## **ATTACHMENT D. DOCUMENTS REVIEWED**

### Financial Reports

- Annual Secretary of the Board Report (ASBR), Fiscal Year 2021-2022
- Comprehensive Annual Financial Report, For the Year Ended June 30, 2022
- Annual Secretary of the Board Report (ASBR), Fiscal Year 2020-2021
- Comprehensive Annual Financial Report, For the Year Ended June 30, 2021
- Annual Secretary of the Board Report (ASBR), Fiscal Year 2019-2020
- Comprehensive Annual Financial Report, For the Year Ended June 30, 2020
- Proposed FY 2023-2024, District Budget, dated May 24, 2023

### Transportation Budget Reports

- Transportation Department, Budget to Actuals with Encumbrance, fiscal year 2023, May 12, 2023
- Transportation Department, Budget to Actuals with Encumbrance, fiscal year 2022, June 30, 2022
- Transportation Department, Budget to Actuals with Encumbrance, fiscal year 2020, June 30, 2020
- Medicaid Revenue Summary, Transportation (NEMT) Payment Amount, dated June 30, 2021

### Organizational Charts

- Office of the Superintendent
- Transportation Organizational Chart
- Bus vendor Organizational Chart

### Job Descriptions

- Director of Transportation, revised October 01, 2018
- Transportation Evaluator, revised December 19, 2019
- Manager, Operations Systems Technology, revised October 01, 2018

### Audit Reports

- Transportation GPS Observations, report # 2021-02, dated April 22, 2021
- Transportation/Bus Operations, report #2021-03, dated May 07, 2021

### Inspections

- 2023 State Inspections Results
- Inspection Follow-up Spring-2023
- State Inspection Hall Street, May 2023

### Contracts:

- Fully Executed Contract between Board of Education of the City of St. Louis and Missouri Central School Bus, a Subsidiary of North America Central School Bus, effective July 1, 2022

- Transportation Services Request for Proposal, Scope of Work, Attachment A
- Liquidated Damages, Exhibit F\_1: Pricing Proposal – Pricing Proposal 5 Years Term, Daily Bus Rate

#### Others

- SLPS Call Center Report, Call Report Dashboard, dated May 2, 2023
- District Demographic Data
- District Proportional Attendance Rates
- Exhibit A, FY 2022-2023 Bell Times
- Fleet List
- Monthly Joint Review Presentation, April 17, 2023
- Monthly Joint Review Presentation, October 24, 2022
- Buses and Non-Instructional Operations, Transportation, Board Education Policy, P3541.3.2.
- Transportation Standard Operating Procedures
- Transportation Staff Tasks
- Strategic Plan
- St. Louis Metro Scorecard, dated April 24, 2023



## ATTACHMENT E. 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	Organizational Structure	2007
	Operations	2008
	Facilities	2010
	Human Resources	2014
	Financial Operations	2015

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

City	Area	Year
Cincinnati	Information Technology	2022
	Curriculum and Instruction	2004
	Curriculum and Instruction	2009
Chicago	Special Education	2013
	Warehouse Operations	2010
	Special Education I	2011
	Special Education II	2012
	Bilingual Education	2014
Christina (DE)	Curriculum and Instruction	2007
Clark County	Operations	2019
	Special Education	2019
Cleveland	Student Assignments	1999, 2000
	Transportation	2000
	Safety and Security	2000
	Facilities Financing	2000
	Facilities Operations	2000
	Transportation	2004
	Curriculum and Instruction	2005
	Safety and Security	2007
	Safety and Security	2008
	Theme Schools	2009
	Special Education	2017
Columbus	Superintendent Support	2001
	Human Resources	2001
	Facilities Financing	2002
	Finance and Treasury	2003
	Budget	2003
	Curriculum and Instruction	2005
	Information Technology	2007
	Food Services	2007
	Human Resources	2020
	Transportation	2020
Dallas	Procurement	2007

City	Area	Year
Dayton	Staffing Levels	2009
	Staffing Levels	2016
	Superintendent Support	2001
	Curriculum and Instruction	2001
	Finance	2001
	Communications	2002
	Curriculum and Instruction	2005
	Budget	2005
	Curriculum and Instruction	2008
	Organizational Structure	2017
Denver	Superintendent Support	2001
	Personnel	2001
	Curriculum and Instruction	2005
	Bilingual Education	2006
	Curriculum and Instruction	2008
	Common Core Implementation	2014
Des Moines	Budget and Finance	2003
	Staffing Levels	2012
	Human Resources	2012
	Special Education	2015
	Bilingual Education	2015
Detroit		
	Curriculum and Instruction	2002
	Assessment	2002
	Communications	2002
	Curriculum and Assessment	2003
	Communications	2003
	Textbook Procurement	2004
	Food Services	2007
	Curriculum and Instruction	2008
	Facilities	2008
	Finance and Budget	2008
	Information Technology	2008
	Stimulus planning	2009
	Human Resources	2009
	Special Education	2018
East Baton Rouge		

City	Area	Year
El Paso	Human Resources	2021
	Special Education	2022
	Bilingual Education	2022
Fresno	Information Technology	2019
Guilford County	Curriculum and Instruction	2012
	Special Education	2018
Hawaii	Bilingual Education	2002
	Information Technology	2003
	Special Education	2003
	Facilities	2004
	Human Resources	2007
	Transportation	2017
Hillsborough County	Financial Operations	2019
Houston	Transportation	2005
	Procurement	2005
	Special Education	2012
	Transportation	2015
Indianapolis	Facilities Operations	2010
	Capitol Program	2010
	Information Technology	2011
	Procurement	2011
	Finance	2021
	Safety and Security	2022
Jackson (MS)	Transportation	2007
	Information Technology	2010
	Finance and Budget	2013
	Finance	2018
Jacksonville	Bond Referendum	2006
	Communications	2009
	Curriculum and Instruction	2017
	Organization and Management	2002

City	Area	Year
	Operations	2002
	Human Resources	2002
	Finance	2002
	Information Technology	2002
	Finance	2006
	Facilities operations	2015
	Budget and finance	2015
Kansas City	Human Resources	2005
	Information Technology	2005
	Finance	2005
	Operations	2005
	Purchasing	2006
	Curriculum and Instruction	2006
	Program Implementation	2007
	Stimulus Planning	2009
	Human Resources	2016
	Transportation	2016
	Finance	2016
	Facilities	2016
	Curriculum and Instruction	2016
	Information Technology	2022
Little Rock	Curriculum and Instruction	2010
	Curriculum and Instruction	2023
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

City	Area	Year
Miami-Dade County	Procurement	2016
	Construction Management	2003
	Food Services	2009
	Transportation	2009
	Maintenance & Operations	2009
	Capital Projects	2009
	Information Technology	2013
Milwaukee	Research and Testing	1999
	Safety and Security	2000
	School Board Support	1999
	Curriculum and Instruction	2006
	Alternative Education	2007
	Human Resources	2009
	Human Resources	2013
	Information Technology	2013
Minneapolis	Curriculum and Instruction	2004
	Finance	2004
	Federal Programs	2004
	Transportation	2016
	Organizational Structure	2016
Nashville	Food Service	2010
	Bilingual Education	2014
	Curriculum and Instruction	2016
Newark	Curriculum and Instruction	2007
	Food Service	2008
New Orleans	Personnel	2001
	Transportation	2002
	Information Technology	2003
	Hurricane Damage Assessment	2005
	Curriculum and Instruction	2006
New York City	Special Education	2008
	Testing and Assessment	2003



City	Area	Year
	Curriculum and Instruction	2012
	Transportation	2018
	Finance	2018
	Facilities Operations	2018
Omaha	Buildings and Grounds	2015
	Operations	
	Transportation	2016
Orange County	Information Technology	2010
Palm Beach County	Transportation	2015
	Safety & Security	2018
Philadelphia	Curriculum and Instruction	2003
	Federal Programs	2003
	Food Service	2003
	Facilities	2003
	Transportation	2003
	Human Resources	2004
	Budget	2008
	Human Resource	2009
	Special Education	2009
	Transportation	2014
	Curriculum and Instruction	2019
	Organizational Structure	2023
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

City	Area	Year
Prince George's County	Procurement	2010
	Operations	2010
	Transportation	2012
Providence	Business Operations	2001
	MIS and Technology	2001
	Personnel	2001
	Human Resources	2007
	Special Education	2011
	Bilingual Education	2011
	Bilingual Education	2019
Puerto Rico	Hurricane Damage Assessment	2017
	Bilingual Education	2019
Reno	Facilities Management	2013
	Food Services	2013
	Purchasing	2013
	School Police	2013
	Transportation	2013
	Information Technology	2013
Richmond	Transportation	2003
	Curriculum and Instruction	2003
	Federal Programs	2003
	Special Education	2003
	Human Resources	2014
	Financial Operations	2018
Rochester	Finance and Technology	2003
	Transportation	2004
	Food Services	2004
	Special Education	2008
	Human Resources	2022
	Operations	2022
Sacramento	Special Education	2016
	Human Resources	2022
San Antonio		

City	Area	Year
San Diego	Facilities Operations	2017
	IT Operations	2017
	Transportation	2017
	Food Services	2017
	Human Resource	2018
San Francisco	Finance	2006
	Food Service	2006
	Transportation	2007
	Procurement	2007
St. Louis	Technology	2001
	Special Education	2003
	Curriculum and Instruction	2004
	Federal Programs	2004
	Textbook Procurement	2004
St. Paul	Human Resources	2005, 2022
	Transportation	2023
	Special Education	2011
Seattle	Transportation	2011
	Organizational Structure	2017
	Human Resources	2008
Stockton	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
Toledo	Special Education	2019
	Curriculum and Instruction	2005
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