



Review of the Departments of Transportation, Capital Projects, and Maintenance and Operations of the Seattle Public Schools

Summer 2008

In the late fall of 2007 and spring of 2008, Dr. Maria L. Goodloe-Johnson, Superintendent of the Seattle Public Schools, and Donald Kennedy, the district's Chief Financial and Operating Officer (CFOO), requested that the Council of the Great City Schools provide high-level management reviews of the district's human resources, financial operations, transportation systems, capital programs, and maintenance and operations functions.¹ Specifically, the Council was requested to²—

- Review and evaluate the leadership and management, organization, and operations of the respective departments and programs.
- Develop recommendations that would help the departments and programs achieve greater operational efficiency and effectiveness.

In response to these requests, the Council assembled Strategic Support Teams of senior managers from other major urban school systems with extensive experience in these operating areas.

This report presents findings and recommendations for the teams on transportation, capital projects, and maintenance and operations. The respective teams were composed of the following individuals. (Attachment A contains brief resumes of team members.)

- **Project Staff**

Bob Carlson, Project Director
Director, Management Services
Council of the Great City Schools

¹ The Council has also recently conducted reviews of the district's human resource operations, finance, information technology operations, and bilingual education programs.

² The Council has conducted nearly 150 instructional, management, and operational reviews in about 45 big-city school districts over the last ten years. The organization conducts these reviews using Strategic Support Teams of current and former senior managers with strong reputations for developing and promoting effective operations and best practices in major urban school systems across the country. 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. (Appendix E lists the reviews that the Council has conducted.)

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David Koch, Principal Investigator
Chief Administrative Officer (Retired)
Los Angeles Unified School District

- **Transportation Operations**

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Assistant Superintendent, Service Center Operations
Buffalo City School District

Richard Jacobs
Director of Transportation
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- **Capital Programs**

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- **Maintenance and Operations**

Neil Gamble
Director of Maintenance and Operations
Los Angeles Unified School District

Paul Gerner
Associate Superintendent, Facilities Division
Clark County School District

Charles Hollar
Director of Buildings and Grounds
Columbus City Schools

Bruce Husson
Assistant Superintendent, Business Services (Retired)
San Diego Unified School District

Tom Lindner
Executive Director, Physical Plant Operations Division
Broward County Schools

Michael Turza
Director of Business Services
Milwaukee Public Schools

To conduct their work, the Strategic Support Teams reviewed documents provided by district staff before visiting the Seattle Public Schools. The teams also examined additional documents, reports, and data and visited schools during their visits. (A list of documents reviewed by the teams is presented in Appendix B.)

The teams conducted fieldwork for the project during four-day site visits to Seattle on May 20-23 (transportation), June 15-18 (capital projects), and June 22-25 (maintenance and operations) 2008. The general schedules for the site visits are outlined below. Detailed working agendas for each team are shown in Appendix D.

The teams met with the Superintendent and/or the Chief Financial and Operating Officer on the first night of each visit to understand their expectations and objectives for the reviews and to make any last-minute adjustments to the work schedules. The teams used the first two full days of the site visits to conduct interviews with key staff members and to visit schools and offices. (Complete lists of individuals interviewed are included in Appendix C.)³ The final day of each site visit was devoted to synthesizing and refining the teams' findings and recommendations, and to debriefing senior management.

³ The Council's peer reviews are based on interviews of staff and others, a review of documents provided by the district, observations of operations, and professional judgment. The teams conducting the interviews rely on the willingness of those interviewed to be truthful and forthcoming, and make every effort to

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The Council sent drafts of each section of this document to the respective team members for their review in order to ensure accuracy and to obtain their concurrence with all recommendations. This management letter contains the findings and recommendations from each team.

The reader should note that the findings in this and previous Council reports reflect conditions that existed largely prior to the arrival of Superintendent Goodloe-Johnson, who take the reins of the district in July 2007, and Don Kennedy, who joined the district on November 1, 2007. It was soon after their arrival that the Council was asked to review various aspects of district operations and programs. The Council has made note of the fact that the superintendent and her chief operating and finance officer began moving immediately on many of the teams' recommendations and given the teams confidence that the district is on the right track with their initial reforms.

The findings and recommendations from the latest three teams (transportation, capital projects, and maintenance and operations) follow—

B. Transportation Operations

Background

- The Department of Transportation reports to the Director of School Services, who, in turn, reports to the Chief Operations and Financial Officer. The department has a staff of approximately 36 full time equivalents, including a Manager, an Assistant Manager⁴, four Supervisors, and analytic, office, and Control Center staff. The department's budget for the fiscal year 2008 (ending 8/31/08) was \$29.4 million, compared with a 2007 total budget of \$27.2 million. Approximately \$16 million of the district's transportation costs are reimbursed by the state of Washington.
- The actual operation and maintenance of school buses is contracted to an outside vendor.⁵ For fiscal year 2008, \$22.2 million was budgeted for contracted school buses, \$1.1 million for taxis, and \$0.9 million for transit passes.
- The major operating units in the Transportation Department include—
 - An Intervention Unit with a Supervisor, eight Intervention Associates, 11 Special Education Bus Supervisors, an Intervention School Bus Driver, and 24 hourly Head Start Bus Monitors. The unit provides intervention services for students with behavioral problems on school busses, student supervision on selected Special Education routes, and substitutes for absent contract drivers.

provide an objective assessment of district functions but cannot always judge the accuracy of statements made by all interviewees.

⁴ The Assistant Manager position is currently vacant.

⁵ The district, however, provides the fuel.

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- The Special Services Transportation Unit with a Supervisor and two Transportation Specialists, who route and schedule services for Special Education students.
- An Elementary Transportation Unit with a Supervisor and five Transportation Specialists, who route and schedule services for elementary students.
- A Secondary Transportation Unit with a Supervisor and one Transportation Specialist, who route and schedule services for secondary students.
- A Control Center, which includes three Work Control Operators and hourly support personnel. The Control Center is in direct contact with the contractor's bus dispatch personnel and handles inquiries from students, parents, and schools relating to transportation activities.

Findings and Observations

The Council's Strategic Support Team's findings and observations are organized around four general categories: Commendations and Pre-existing Leadership and Management, Organization, and Operations and Technical issues.

➤ Commendations

- A new Transportation Manager who appears competent and motivated is replacing the retiring manager.
- The customers, including school principals and program administrators, gave the department good marks in spite of difficulties that occurred at the beginning of the 2007-2008 school year.
- Morale is generally high in the department with the possible exception of some routing staff.
- The Control Center staff seemed to be well informed and took pride in their role in supporting students and parents.
- The department is attempting to update its technology, including a new GPS routing system and an on-line field trip request system that is under development.
- The district is moving aggressively to expand the use of public transportation (Metro) passes to meet the needs of secondary students.
- Student routing is done consistently faster than the 3-5 days promised to new enrollees.

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- The department's culture of accommodation results in excellent customer service to students, parents, and school personnel.
- Most staff appeared interested and willing to implement changes to improve departmental operations.

➤ **Pre-existing Leadership and Management Issues**

- The Transportation Department does not have a business plan with goals and objectives that are linked to the district's Strategic Plan or benchmarks and performance indicators to measure the performance of departmental units or the school bus contractors.
- The department is not particularly data driven. For example—
 - Consistent and basic data on student ridership by program and by mode of transport, bus counts, and numbers of routes are not readily available.
 - Regular management reports are generally lacking.
 - The Control Center's logs are not summarized, analyzed or used to make decisions or to allocate resources.
 - Contractors are not required to provide basic service-level information.
 - There is no routine system for principals to report pupil transportation problems to the department.
 - It is difficult to reconcile the number of personnel with the budget, the organization chart, and staff rosters.
- There is a general lack of communication and coordination between the Transportation Department and the district's Learning and Teaching and the Improvement and Compliance Departments. For example—
 - New instructional programs are established, existing programs are moved, and school-site grade levels are reconfigured without coordinating with the Transportation Department or considering the logistical implications of the decisions.
 - The department is not at the table when long range school facilities' planning is considered.
 - The department is not represented at Individual Education Program (IEP) meetings so that students with disabilities end up being transported on a portal-to-portal basis.

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- There appears to be an overall lack of financial accountability for the pupil transportation program.⁶ For example—
 - There are no apparent incentives to control program costs and no consequences for failing to do so.
 - Enrollment policies are established, and pupil and program placement decisions are made without considering their associated transportation costs.
 - A large number of taxis are used for several programs, even though taxis services are ineligible for state transportation reimbursements.
- There is little emphasis on training for district or contracted transportation personnel. For example—
 - Bus drivers are not required to attend workshops provided by the Intervention Unit.
 - Taxi and shuttle drivers are not screened or trained to district standards.
 - There was no information readily available regarding the content or frequency of training provided by the contractor or how it compares to state requirements.
- There is no succession plan to deal with a number of impending retirements in key transportation positions.⁷

➤ **Pre-existing Organizational Issues**

- A proposed reorganization and restructuring of the Transportation Department contains the following shortcomings—
 - It eliminates the Assistant Manager position, which the team believes is essential to providing back up for the Manager.
 - It does not address the functional silos that have inhibited communications and effective coordination within the department. For example, there is no emphasis on using cross-functional teams as a means of spurring collaboration.

⁶ The district's budget practices, which do not provide for a rigorous review of proposed expenditures and the limited use of fiscal projections and interim financial reporting, accounts, in part, for this overall lack of financial accountability.

⁷ There was, however, a few days to transition from the retiring to the new Transportation Managers.

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- It does not address the appropriateness of having the Intervention Unit, whose primary responsibilities include student disciplinarians and dispute resolution, in the Transportation Department. The proposal also does not address why the Intervention Associates should continue to serve as substitute bus drivers and part-time Control Center operators if the unit is appropriately placed and its responsibilities are critical department functions.
- The Control Center’s staffing model appears to be stretched to meet peak period demands, but does not provide productive activities for staff during slow periods.

➤ Pre-existing Operational Issues

- The current student assignment policies result in higher pupil transportation costs, underutilized bus capacity, and inefficient bus routes. (See bilingual education report.)
- The district’s school-bus routing and scheduling systems result in—
 - Inefficient use of available resources because bell times (start and end times) are not coordinated with the Transportation Department.
 - Individual schools and programs deviating from established bell times without considering how the changes impact transportation operations.
 - Inefficient, costly, and potentially hazardous drop off locations because the department has a flexible policy regarding requests to change after-school locations.
 - Routing inefficiencies due to short-walk distances to bus stops.⁸
 - Head Start and Special Education buses that are rarely used to transport general education students and special program students who do not regularly ride on general education buses.
 - Special programs operating on different bell times.⁹
 - Bus routes that are established based on eligible students and not on actual anticipated ridership.
 - Actual ridership that is significantly lower than assigned students.¹⁰

⁸ The team’s query of the VersaTrans database indicated that 1,930 first graders currently scheduled for transportation have an average walk to stop distance of one tenth of a mile (528 feet).

⁹ The team found at least two examples where students with disabilities had instruction bell times that were different than the bell times for non-disabled students

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- Inactive route stops because the department does not remove stops that are unused for extended periods of time.
- Special Education therapy and school field trips that are scheduled during peak transportation periods and impact the contractor's ability to provide other transportation services.
- Excessive numbers of courtesy riders, i.e., students who live within the established walking distance from their school and are not otherwise qualified to ride the bus.¹¹
- New bus stops that are not checked for safety compliance prior to activation.
- The district's use of taxis to transport some students (e.g., homeless students, non-public schools, and special education students) is costly, less safe, and not reimbursable under the state's transportation program.
- There is a lack of supervision in loading zones and security appeared to be non-existent at the school sites that the team visited.
- There are a number of administrative issues that include—
 - Little oversight and no field supervision of the contractors by the department.
 - Contractors who are not held to any articulated performance standards. They are not, for example, required to report performance data such as on-time, late, and missed routes.
 - Inadequate and inconsistent processes for data collection and assessing of liquidated damages for failure.
 - Insufficient amounts of liquidated damage penalties to motivate contractual compliance. The total amount of liquidated damages assessed during the past year, for example, was small based on the size of the contract and reported levels of service failure.
 - Failure to enforce contractual requirements regarding bus-driver uniforms.
 - Failure of the contract bus drivers to validate school bus riders.

¹⁰ The team found that the actual ridership of 13 buses arriving at two schools was only 53 percent of the assigned students.

¹¹ Sixteen percent (16%) of all middle school students, for example, are courtesy riders.

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- No articulated strategy for the primary contractor to deal with the current driver shortage, resulting in the district's Intervention Associates serving as substitute bus drivers in order to fill the void.
- No computerized fuel management system and lack of adequate internal control over the fuel the district provides to the contractor.
- Daily changes that contractors make to routes, resulting in parental and school notification concerns.
- Questionable ridership data because drivers are unable to accurately report the number of students they actually transport to school.
- There are significant deficiencies in the department's technology systems. For example—
 - The deployment of the VersaTrans system one month before the start of the 2007-08 school year was poorly conceived and executed.
 - The Control Center does not have an automated call-management system to record response times or the number of calls that are processed, missed, placed on-hold, or abandoned.
 - There is duplication of effort and the potential for inconsistencies because the key data bases impacting pupil transportation, notably the enrollment system on the VAX, the eSIS student data system, and the VersaTrans bus routing system, are not integrated.
 - The capabilities of the GPS system are not fully leveraged. For example, the GPS is used to check on the location of a bus after a complaint, but is not used to proactively track buses or monitor the contractor's performance.
 - Computer hardware or software installation issues may account for slow network response times on the department's routing system.
 - The nightly upload of information between VAX, eSIS, and VersaTrans is overly time consuming and reduces the availability of the systems to transportation staff.¹²

¹² The custom program developed by VersaTrans at the districts' request (which requires lengthy night-time processing) is based on a misunderstanding of the capabilities of the VersaTrans system and an expectation of detail that is unrealistic and has no relation with the current level of service provided by the department. The custom program assigns sub definitions of corner stops so that in theory the parents would know exactly which of the four corners to wait on when in reality the process to formally notify parents of bus stop assignments is almost non-existent.

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- The Transportation Department generally lacks standard procedures (SOPs) for its operations. For example—
 - Students end up waiting for parent pick up in the Intervention Assistant’s vehicles or at police stations because alternative sites have not been identified for undeliverable students.
 - Procedures have not been established for either safeguarding a school’s inventory of transit passes or preventing the sale of passes by students.
 - School and departmental staff are unclear as to who is responsible for dealing with student disciplinary problems arising on a school bus.

Recommendations

1. Create a strategic vision and business plan for the Transportation Department that is linked to the district’s Strategic Plan and incorporates a data-driven management approach that includes—
 - a. Goals, objectives, benchmarks and measurable performance indicators for the school bus contractors and each unit within the department.
 - b. Standards for service with formalized processes for evaluating contractors and for determining customer satisfaction with the services provided.
2. Involve the department as a strategic partner in the district’s instructional and facility management processes by including it in decisions related to—
 - a. Student assignment policies (e.g., school choice, walking distances, attendance boundaries)
 - b. Program placement
 - c. Pupil placement (e.g., IEPs)
 - d. School-building utilization (e.g., grade level configuration)
 - e. Establishing and coordinating school bell times.
3. Establish departmental financial management accountability measures to—
 - a. Maximize state reimbursement revenues
 - b. Articulate project expenses based on anticipated ridership, pupil placement policies, and instructional program configurations

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- c. Require interim financial reporting with year-end projections of potential variances
 - d. Provide year-end review and explanation of revenue and expenditure variances.
4. Create a comprehensive training program for all contract and district personnel involved in transporting students that includes—
 - a. District policies
 - b. Safety procedures
 - c. Emergency Procedures
 - d. Pupil management
 - e. Special student needs.
5. Retain the backup management position of the Assistant Manager and develop succession planning within the department to ensure knowledge transfer and the orderly transition of responsibilities.
6. Reorganize and/or restructure the department to ensure that—
 - a. The contractors are field managed and supervised.
 - b. The skill sets of the Associates are appropriate to serve and are, in fact, utilized as student disciplinarians and arbiters for dispute resolution if the Intervention Unit remains within the Transportation Department.¹³
 - c. The Transportation Specialists are organized around geographic school assignment areas, rather than programs.
7. Restructure the Control Center to more effectively manage resources and better meet peak demand by—
 - a. Acquiring a modern call-management system
 - b. Using more part-time hourly employees for peak demand staffing.
8. Improve transportation bus routing and service delivery efficiencies by—

¹³ As part of the reorganization and restructuring of the department, the district should consider reassigning the Associates to the district's Improvement and Compliance Department and backing filling the vacancies with hourly employees who can serve as substitute bus drivers and part-time Control Center operators.

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- a. Revising routing processes based on projected actual ridership, rather than eligible ridership.
 - b. Limiting deviations from established bell times, changes in drop off locations, and the scheduling of therapy and field trips during peak periods.
 - c. Mixing the use of buses serving general, Head Start, and Special Education students.
 - d. Using circle routes rather than line routes to ensure only one bus covers a geographic area.
9. Test-drive all new routes and bus stops to ensure safety and appropriateness.
10. Make efforts to reduce or eliminate the use of taxis.
11. Improve the management of pupil transportation contracts by—
- a. Establishing field monitoring and supervision
 - b. Requiring reporting of performance data
 - c. Creating a uniform system for reporting late and no show buses
 - d. Requiring contractors to provide their own substitute bus drivers.
 - e. Increasing the rates of liquidated damages for performance failures
 - f. Installing a computerized fuel pump monitoring system with appropriate internal controls over district fuel
 - g. Requiring reports on fuel usage and miles per gallon per vehicle to be provided to the district on a regular basis.
 - h. Establishing a contractor invoice audit function within the department.
12. Integrate the student and transportation computer systems to improve operational efficiencies and more effectively use the capabilities of the current routing and GPS systems.
- a. Assign a full-time IT person to service the technology requirements of the department.
 - b. Clean up and refine the VersaTrans data-base (for example, one way streets, dead ends, un-travelable streets) and eliminate unused stops and routes.

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- c. Use the archived file concept to establish regular “effective dates” for transportation changes and establish automated processes to disseminate the information to buses, schools, and parents.
 - d. Use the base-level VersaTrans program to expedite nightly processing.
13. Establish and disseminate policies that assign responsibilities and identify procedures for dealing with—
- a. Student disciplinary problems arising on school buses.
 - b. Supervising students at school pick-up and drop-off locations
 - c. Undeliverable students
 - d. Safeguarding of transit passes at school sites.

B. Capital Programs

Background

- The Seattle Public Schools funds its capital program largely through the use of property tax levies. In the past ten years Seattle voters passed the following four capital levies--
 - A six-year \$150 million levy in February 1998 to provide Buildings, Technology, and Athletic Facilities (BTA I). The program included over 465 facilities improvement projects, including \$60 million designated for Building Reinvestment (including deferred maintenance, code compliance, and seismic upgrade projects), \$40 million for Technology (including classroom technology and management information systems), \$40 million for Athletic Facilities, and \$10 million for Science and Performing Arts Facilities.
 - A six-year \$398 million property tax levy in February 2001 (Building Excellence II Capital Bond - BEX II) to fund renovation and new construction at seventeen schools.
 - A six-year \$178 million capital levy, BTA II, in February 2004 to pay for nearly 700 projects. This levy contains three major components: \$95 million for Buildings, \$43 million for Technology, and \$40 for Academics.
 - A \$490 million capital bond (Building Excellence III Capital Bond - BEX III) in February 2007 to pay for capital projects in three categories—
 - Building projects, infrastructure, and technology improvements.

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- Building projects, including the renovation or replacement of seven school facilities. Infrastructure improvements include health and safety upgrades and the replacement and renovation of athletic fields
- Technology improvements, including replacement of classroom computers, expansion of a website that keeps families informed of student progress, and improvements to business and academic systems.
- In addition to the property tax levies, approximately \$2 million in annual revenues from property leases and sales are directed to the Capital Eligible Program (CEP). The General Fund is used for normal repair and maintenance and some deferred maintenance expenses. The district's Self-Help Program encourages students, parents, and community members to participate in other facilities improvement projects.
- The capital programs of the district are administered primary by the Department of Technology and the Facilities Department, which has created distinct units to manage the BEX and BTA programs.
 - The BEX Unit consists of the Program Manager, three Construction Project Engineers, a Relocation Planner, a Consultant to Principals, and clerical support. The unit is supported by two outside construction management firms that provide staffing for the oversight of contractors, a project management and financial reporting data system, and public relations and outreach support
 - The BTA Unit consists of a Program Manager, five Construction Project Supervisors, who directly management projects funded under the BTA program, and clerical support.

Findings and Observations

The Council's Strategic Support Team findings and observations are organized around four general categories: Commendations, and pre-existing leadership and management, organization, and operations issues.

➤ Commendations

- The district has successfully passed four consecutive levies in the past ten years to support its Capital Programs.
- The district has established a Citizens Oversight Committee with a diverse and professional membership to oversee the BEX programs.
- The facilities planning and finance staff has good communications, planning, and analytical skills and has--

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- Developed a superior Facilities Master Plan.
- Completed a maintenance and repair analysis that clearly illustrates the growing deferred maintenance funding deficit.
- Planned a commendable 20 year CEP budget.
- The district has engaged competent and professional construction management firms that have developed effective processes and procedures to manage the BEX program.
- The capital projects staff appears to be dedicated, experienced, and competent.
- The district staff and its construction managers have established excellent BEX reporting systems and documents for the district's administration, the BEX Programs Oversight Committee and the Board of Education.
- Districtwide Design and Material Standards have been adopted for the BEX program.¹⁴
- The Design Team process ensures the comprehensive participation of students, staff, parents, and the community in BEX capital projects.
- The need for public relations and community outreach is recognized and has been incorporated into the BEX program management.
- Site-based discretionary funds have been set aside for major projects to meet unanticipated needs and scope changes as determined by local school staff.¹⁵

➤ **Pre-existing Leadership and Management Issues**

- Although the district has a school-closing process, school buildings have neither been closed nor sold in proportion to declines in student enrollment.
- The district has only begun to address the issue of student assignment policies; however, there is no master plan for closing the fairly large number of small schools.
- Without a comprehensive plan for facilities utilization, the district risks expending its limited capital funds on sites that may be abandoned in the near future.

¹⁴ The team did note, however, that the Design and Material Standards are not always used by the BTA and Self-Help programs.

¹⁵ BEX provides \$15-\$20,000 for elementary schools and up to \$100,000 for high schools for these site-based discretionary decisions.

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- The team was advised that 70 percent to 80 percent of BEX funding will be expended on historic renovations that tend to be far more expensive than new construction.
- A deferred maintenance backlog of at least \$486 million¹⁶ continues to increase because—
 - The district’s decision to maintain the capital levy rates at a constant level has resulted in the loss of buying power due to escalating costs.
 - The district’s General Fund budget does not support maintenance and repair needs as recommended in the Facilities Master Plan.¹⁷
- The BTA capital program does not have a Community Oversight Board or the project reporting mechanisms employed by the BEX program.

➤ **Pre-existing Organizational Issues**

- There is no comprehensive management umbrella over the capital programs of both the Facilities Department and the Department of Technology. The capital programs of the Technology Department, in particular, appear to lack oversight and coordination with other parts of the district’s organization.
- There appears to be little coordination of the BEX, BTA, and CEP within the Facilities Department.
- Regular repair and maintenance programs and individual units within the Facilities Department seem to operate in silos.
- Compensation discrepancies between the BEX Construction Project Engineers and the BTA Project Managers appear to reflect a greater value placed on the new schools and renovation projects funded by the BEX than on the major maintenance activities funded by the BTA.
- Three new positions (Construction Project Engineers) have been created within the Facilities Department without a clear definition of their responsibilities. Their role in the organization is reported to be “evolving.”

¹⁶ The maintenance and operations team concluded that the district’s deferred maintenance backlog may be significantly under-stated – See section C of this report.

¹⁷ The maintenance and repair funding gap is the difference between the industry standard (The Federal Facilities Council, The National Research Council, and The Building Research Board) funding rate of 2 percent to 4 percent of replacement cost compared to the amount actually being provided. The gap is between \$50 and \$190 million over a six year period, even with BTA funding, according to the Facilities Master Plan.

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- The independence and objectivity of the Environmental Health and Safety Unit could be compromised if it continues to be part of the Facilities Department.

➤ Pre-existing Operational Issues

- The district's financial management systems do not effectively support the business operations of the BTA and BEX capital programs. For example—
 - The BTA program lacks a project accounting system, which necessitates the maintenance of off-line sub-systems.
 - The district's financial system does not report the same level of detail that exists in the BEX project accounting system used by the construction managers.
 - There is no single system that records and reports capital budgets, actual expenditures, and project forecasts.
 - There is no consolidated database for asset management, and the district does not appear to be able to comply with Generally Accepted Accounting Principles (GAAP) that relate to fixed asset accounting.
 - The district's financial system is unable to accommodate multi-year encumbrances relating to contract awards.
- The procedures for contracting and processing change orders are cumbersome, slow, and paper intensive.
- Different Facilities and Technology Department units are engaging architects, designers, and engineers for various capital projects without coordinating or consolidating the efforts.
- The district does not have a contractual right to own the data that is housed in the project management system that is used by construction managers for the BEX program.
- The construction manager's project management system does not electronically interface with the district's financial systems.
- The BTA program has been used to cover unanticipated costs and project overruns incurred by the BEX program.¹⁸ For example—

¹⁸ The team was advised by the district's in-house legal counsel that the Board of Education has the express authority to transfer expenditures between and among the voter approved levies.

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- There was a reduction in BTA projects in 1997 to partially fund \$14 million that was expended for an unanticipated interim site associated with a BEX construction project.
- Expenditures were moved among the four levies as part of a levy reconciliation and close out process in 2004.
- The team shares concerns expressed by the district’s financial management staff that there could be potential legacy commitments resulting from the significant number of central office positions that are currently funded by capital programs. For example—
 - Capital programs are used to fund over 90 FTEs that are part of the district’s central administration.
 - Approximately 60 percent of the Department of Technology’s budget is provided by capital programs.¹⁹
- The district has not been maximizing its revenue potential by collecting fair market rents and fees for the use of its facilities and closed schools.
- The district Design and Material Standards are not always followed by the BTA and Self-Help programs.
- It was unclear to the team whether the federal E-Rate program is being maximized or adequately leveraged.²⁰ (District E-Rate staff may want to participate in the regular meetings and conference calls that the Council convenes with USAC.)
- Follow-up community surveys are not used to gauge acceptance and approval of the work completed by the capital programs.
- There is no comprehensive close-out reporting to the community for the BTA levies comparable to the front-end marketing effort that was made on its behalf.

Recommendations

1. Conduct a Capacity Management Study to evaluate the district’s excess building capacity and create a master plan for the closure of underutilized facilities.

¹⁹ Review of Human Resources, Finance, and Information Technology Operations of the Seattle Public Schools, April 2008.

²⁰ This was also a finding of the team reviewing the Department of Technology.

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2. Take steps to address the district's growing deferred maintenance backlog through enhanced General Fund support and by increasing the BTA levy amount in future capital elections.
3. Incorporate the review of the BTA program as part of the BEX Oversight Committee's responsibilities.
4. Create a Capital Programs Manager position within the Facilities Department with overall responsibilities for all capital programs.
5. Take steps to better define the responsibilities of the BTA Construction Project Engineers and examine comparability to their BEX staff counterparts.
6. Extract the Environmental Health and Safety unit from the Facilities Department and make it a direct report to the COO or a part of the district's Risk Management Department.
7. Conduct a requirements review of the Facilities Department to identify the technologies it needs to support its operations and capital programs.
8. Improve the efficiency of the work flow of business processes and procedures.
9. Negotiate rights to district capital project information (in electronic form) currently residing in the construction manager's system.
10. Conduct an audit of the duties and responsibilities of positions charged to the capital programs to ensure that capital funds are not being used to support other programs.
11. Develop a contingency plan for the necessary ramp-down of central office staff charged to capital programs if future capital levies are not continued.
12. Establish and implement market rates for usage of district property by outside groups.
13. Mandate the use of the district's Design and Material Standards (originally developed for the BEX program) by the BTA, Self-Help, and other district facilities programs.
14. Communicate capital program close-out results to the Board and public to help ensure that the commitments to voters have been met and conduct community surveys to measure satisfaction with district capital projects.

C. Maintenance and Operations

Background

- The Facilities Services Branch of the Facilities Department is responsible for the district's maintenance and custodial operations; has a budget of \$39 million from the General Fund and \$1.4 million from Capital funds; and includes 434 full-time equivalents (FTEs).
- The Senior Manager reports to the Director of the Facilities Department and has six direct reports—
 - The Maintenance Services Unit, including a Manager, a Construction Project Supervisor, a BEX (Building Excellence Capital Bond) General Foreman, and a General Foreman to whom most of the staff of 101 FTE skilled craft workers report. The unit has a budget of \$8.3 million from the general fund and \$0.8 million in capital funds.
 - The Custodial Services Unit, including a Manager, a Senior Supervisor and three Area Supervisors to whom 298 FTE site-based custodial staff report, and one employee who is responsible for building rentals. The unit has a budget of \$18.9 million from the general fund and \$0.4 million from capital funds.
 - The Work Management Services Unit (Work Control), including a Manager, one Analyst and four Work Control Specialists. The unit has a budget of \$0.3 million from the general fund and \$40,000 in capital funds.
 - The Environmental Services Unit, including a Senior Supervisor, a Grounds Foreman (with a staff of three Leads, 11 Gardeners, 20 Summer Gardeners, and a Heavy Equipment Operator), Four Sports Complex Groundskeepers (who have three Assistant Groundskeepers), three Mechanical Coordinators (who operate and maintain the energy management control system for the heating, cooling, lighting, and irrigation systems at 88 sites) and two Utilities and Resource Conservationists. The unit has a budget of \$11.2 million from the general fund and \$0.25 million in capital funds.
 - A Coordinator of Construction Records Services, who is responsible for archiving the building plans in the district.
 - The Office Support Services, which provides administrative, timekeeping, and HR records support.

Findings and Observations

The Council’s Strategic Support Team findings and observations are organized around four general categories: Commendations, and pre-existing Leadership and Management, Organizational, and Operational issues.

➤ **Commendations**

- The Director of the Facilities Department is bringing together the Capital Projects and Maintenance and Operations to better coordinate their efforts.
- The Energy Conservation Program appears to be well-organized and effective. For example—
 - The Resource Conservation Specialists have written goals and objectives that include performance expectations.
 - The program generated \$350,000 in cost avoidance last year.
 - A shared savings program returned \$65,000 in energy savings to individual schools last year.
- Boilers and other HVAC equipment appear to be adequately maintained and in good repair based on the observations of the team.²¹
- A web-based building climate control system has been implemented to facilitate quick responses to system failures in about 80 percent of the buildings.
- The Coordinator of Construction Records Services is organizing and archiving a comprehensive set of “as-built” building plans for each of the school sites.

➤ **Pre-existing Leadership and Management Issues**

- The interdependence of the academic and support operations, including the maintenance and operations of school facilities is under-appreciated and under-valued.²² For example—

²¹ The team visited 12 school sites listed in Appendix B of this report.

²² The team made a similar observation when it reported that the Transportation Department was not viewed as a strategic partner in the district’s instructional and facility management processes. For example, the district’s Learning and Teaching and Improvement and Compliance Departments establish new instructional programs, move existing programs, reconfigure school site grade levels without considering the logistical implications of their decisions.

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- The ability to provide a safe, secure and healthy learning environment is constrained by resource allocation decisions that are made at executive levels.
- School principals expressed dissatisfaction with the conditions of their buildings during team interviews, but were reluctant to identify any resources they would be willing to re-direct to improve those conditions.
- The Facilities Services Branch does not have a business plan with goals and objectives that are linked to the district's Strategic Plan or benchmarks and performance indicators to measure its performance.
- Facilities Services suffers from poor internal and external communications. For example—
 - Meetings between facilities managers and principals to review mutual concerns are not regularly scheduled.
 - Until recently, there has been poor coordination between Facilities Services and capital programs.
 - Custodial supervisors do not regularly communicate with the principals who are part of their cluster of schools.
 - The semi-annual custodian evaluation process involves only about 30 percent of the principals.
- There are low expectations for the performance of Facilities Services personnel. For example—
 - Principals and school staff have little expectations that their buildings will be in good repair and clean for the start of school in the fall.
 - There appears to be an acceptance of mediocrity based on the curb appearance of landscaping, window treatments, and the cleanliness of buildings.
 - There are no performance incentives and few consequences for poor performance.
 - Sick days are viewed as an entitlement for additional vacation days, rather than a health benefit to be used when actually needed.
- There appears to be generally poor morale among maintenance and operations personnel. For example—

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- Department employees do not feel they are supported by management.
- Some employees express an attitude of despair, e.g., that nothing would be done to improve current situation.
- A mutually adversarial relationship exists between the department and the two unions who represent employees. For example—
 - Communications are generally limited to the processing of grievances and claims of unfair labor practices.
 - Meetings between management and leadership of the unions associated with maintenance and operations are not regularly scheduled to deal with performance and productivity issues.
 - Low performance levels are not recognized as a prelude to the potential for out-sourcing functions.
- The failure to remove poor performing employees and the annual “shuffling” of custodians based on seniority are *blamed* on the cumbersome disciplinary procedures of existing labor agreements
- There is a general lack of orientation for new and on-going training programs for veteran employees.
- There is a lack of customer focus within the Facilities Services Branch. For example—
 - There are no mechanisms to measure customer satisfaction.
 - There is no customer service training or liaison.
 - School principals rate custodial service “zero to one” on a ten point scale (ten being best).
 - Principals rate maintenance services “about six” on a ten point scale (ten being best), but have low expectations for performance.
- There are institutionalized impediments limiting the ability to fully staff schools with custodial personnel. For example—
 - New employees serve in part time on-call positions when unfilled full-time positions are available.
 - Employees participate in an apprenticeship program at a reduced rate of pay to become Custodial Engineers.

➤ Pre-existing Organizational Issues

- The Facilities Services Branch is comprised of operational silos with little coordination, communication, or cooperation.
- Custodial supervision is inadequate and ineffective. For example—
 - Although the ratio of Custodial Supervisors to the number of sites they are responsible for appears reasonable (approximately 1 to 30), their duties are more ministerial than managerial because, as the supervisors reported, the amount of required paperwork keeps them from doing field supervision.
 - The team believes that the requirement that Custodial Supervisors visit each of their sites twice a year²³ is too infrequent to provide adequate supervision.
 - The Custodial Supervisors are unavailable to site administrators in the late afternoon because their work day ends prior to the end of the normal school day.
 - The evening shift, which involves the vast majority of custodians, is virtually unsupervised.
 - Custodial Supervisors, by their own account, do not proactively identify and solve problems, but wait for situations to rise to their level before addressing them.
- The overall number of custodial personnel appears to be low based on a study conducted by the Council that found that the number of square feet per custodian was 28,826 in Seattle, compared with 25,064 square feet in 29 other urban school districts. Seattle would need to increase the site-based custodial staff by about 40 positions (15%) in order to achieve the peer average.
- The overall number of skilled crafts workers appears to be reasonable based on a study conducted by the Council that found the average number of maintenance workers per 100,000 square feet of building space was 1.20 in 37 other urban school districts, compared with 1.25 square feet in Seattle.
- There are inefficiencies and higher costs because skilled craft workers appear to be overspecialized.
- The dispatching of all maintenance work from a central facility to the job site results in the loss of productivity caused by travel time.

²³ School principals report that they see the Custodial Supervisors no more than once a year.

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- The Facilities Services organization contains confusing lines of authority. For example—
 - Although most crafts report to the General Foreman, some selected crafts (Musical Instrument Repair, Office Machine Repair and the Shade Shop) report directly to the Manager of Maintenance Services.
 - The Sports Complex Groundskeepers are not supervised by the Grounds Foreman, but instead report to the Senior Supervisor of Environmental Services.

➤ Pre-existing Operational Issues

- The conditions of the grounds and buildings were generally deplorable at the 12 school schools (listed in Appendix B) that were visited by the team.²⁴ For example—
 - Landscaping was overgrown, hallways had not been cleaned, and classrooms were in disarray at most locations.
 - There was a critical need for major maintenance projects in the areas of asphaltic concrete, boiler replacement, floor tile replacement, window repairs, and interior and exterior painting at the schools it visited.
- The district's deferred maintenance backlog may have been significantly understated in the March 2008 Facilities Master Plan.

The Seattle Public Schools 2020 Facilities Master Plan (pps. 88-93) estimated the Backlog of Maintenance and Repairs (BMAR) to be approximately \$485 million (based on a 2005 conditions assessment that was updated for inflation). The estimate included \$91 million in deferred maintenance in closed buildings; \$145 million in deferred maintenance to be addressed in BEX and BTA projects; and \$249 million BMAR for buildings currently being operated and not otherwise being addressed.

The team divided the BMAR of \$249 million by the replacement value of district schools estimated at \$2.8 billion (8.1 million square feet times the current cost of construction of \$340 per square foot to determine that the district's Facilities Condition Index (FCI) was 0.09 (or 9%). Based on industry standards, an organization with an FCI of 0.1 (or 10%) or less would be considered to have very well maintained buildings.

²⁴ Notable exceptions to these observations included Roosevelt High School and Olympia View Elementary school which were clean and in good repair.

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Based on the conditions of the facilities observed by the team, an FCI of 0.09 (or 9%) is suspect and the true FCI (and therefore the true BMAR) may be substantially higher.

- A disproportionate amount of district maintenance resources appears to be spent on breakdowns rather than on preventive maintenance.
- There is no independent planning or estimating mechanism outside of the craft shops because the person who does the estimating also does the work.
- Trades workers leave job sites to go to vendors to obtain parts for their work, which adds to the time it takes to do a job, uses up high value trades salaries for low value parts deliveries, and increases the unit costs for parts.
- Many of current systems are paper intensive, ineffective, inefficient, and are not suited for facilities management purposes. For example—
 - The capabilities of the district’s ERP system have not been operationalized for facilities management.
 - Inaccurate and incomplete information prevent basing the allocation of resources on hard data.
 - The Work Order backlog is not used to determine staffing by craft, i.e., the craft shops with the largest backlog are not those with the largest numbers of workers.
 - There is no computerized inventory of all buildings and equipment tied to the Work Order System.
 - The Work Order System does not track repairs by specific equipment in order to establish a maintenance record for each asset.
 - There is no systematic means to validate the backlog of Work Orders.
 - There appears to be no routine tracking of backlog trends of Work Orders by trade.
 - There appears to be no regular follow-up analysis of work performed to compare performance to industry standards
 - Certain key maintenance personnel (such as the HVAC Mechanical Coordinators) are not part of the Work Order System.

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- There appear to be few controls on who can submit a Work Order and there is no training to help ensure the use of standard terms and definitions.
- The Work Order approval and start-up process is cumbersome and creates confusion at the production level. Shop employees, for example, don't know if work orders have been approved or if funds have been budgeted for materials to complete the work.
- Some craft shops, with large backlogs, are idle due to the lack of funds for materials, e.g., when the materials run out, they stop working.
- The lack of compatibility between systems results in employee time being manually entered into both the Payroll and Work Order Systems.
- Principals report that they spend excessive time pursuing the status of Work Orders.
- Principals have developed back channels to get maintenance tasks done.
- The department lacks a systematic replacement plan (or a methodology based on repair costs) for its equipment and fleet.
- The district has not developed standards for building components based on low-maintenance specifications, designs, and materials.
- The district lacks an effective real estate property management program to produce cost-recovery and market based rental rates.
- There is a general lack of written processes, procedures, and work flows within the Facilities Services branch. For example—
 - The formula for assigning custodians is an excerpt from the union contract, which lists the times allowed for cleaning specific areas.
 - There are no consistent standards for cleaning.
- Grounds supervisors indicated that they have a schedule of visiting schools every nine days. School principals indicated, however, that gardening crews show up 2-3 times a year and practice a “slash and burn” approach to landscaping.
- The team saw no evidence that the department has developed a strategy or plan to attract and retain skilled workers to replace the current aging work force.

✚ Recommendations

1. Establish some appreciation across the entire organization that the district's academic and operations efforts are interdependent.
2. Assess the ability and willingness of Facilities Services management to resolve systemic issues related to supervision, morale, labor relations, planning, and business systems and, in the absence of significant improvements, consider replacing the management or contracting out the management of maintenance and operations services.
3. Place decision-making authority and accountability at department and branch levels once the management issues has been resolved.
4. Require that each of the units within the Facilities Department develop business plans that contain goals, objectives, and performance metrics that align with the district's Strategic Plan.
5. Establish a regimen of meetings to facilitate communication and coordination within the Facilities Department and between its branches and their respective customers.
6. Engage the services of a facilitator experienced in Formal Partnering processes as a means to improve labor-management relationships in the Facilities Department and its employee unions.
7. Streamline employee discipline and assignment processes to improve efficiency while protecting workers rights.
8. Establish a formalized program that orients new employees and provides training opportunities for continuing staff with a focus on developing a culture of customer service.
9. Develop mechanisms to measure customer satisfaction with maintenance and operations services on a regular and on-going basis.
10. Remove self-imposed obstacles to achieving fully-staffed custodial positions.
11. Restructure the duties, responsibilities, and hours of the Custodial Supervisors to transform these positions into visible leaders of custodial services.
12. Consider increasing the number of site-based custodial positions to achieve greater comparability with other large urban school systems.
13. Establish a cross-functional general maintenance position to provide added flexibility and efficiency to the repair services.

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14. Consider the establishment of maintenance satellite offices or a mobile maintenance team program to reduce non-productive travel time.
15. Review and modify the reporting relationships within the Facilities Service organization to provide logical lines of authority and reasonable spans of control.
16. Re-compute the district's deferred maintenance backlog, implement an ongoing regime of professional facilities assessment, and broaden the use of FCI as a planning and decision-making tool for life-cycle management of the physical plant.
17. Re-focus resources to put greater emphasis on preventive maintenance.
18. Establish a planning and estimating function that is separate and apart from the craft shops doing the actual work.
19. Implement a comprehensive integrated Facilities Management Information System with a verifiable job-cost work order process capable of tracking maintenance and repair costs by asset and providing management and customer information on a timely basis.
20. Ensure that craft shop workers are not idled by a lack of materials.
21. Establish a systematic and on-going plan for replacing equipment and the fleet in the maintenance and operations department.
22. Establish low-maintenance design and material standards and specifications for all district construction, reconstruction, repairs, and replacement.
23. Create a real estate management program with full cost-recovery, market-based rental rates.
24. Document processes, procedures, and work flows with desk-top manuals and quick reference guides.
25. Develop a long range plan to attract and retain new craft workers to address the issue of the department's aging work force.
26. Establish and maintain an inventory of commonly used maintenance parts to stock trade vehicles, and purchase such parts in quantities to reduce unit costs. Use low-cost parts runners to deliver specialized parts to job sites.

FINAL NOTE

It is important for the reader to note that the Council’s findings, as critical as they are, reflect conditions that existed prior to the arrival of Dr. Maria Goodloe-Johnson as superintendent, who took the reins of the district in July 2007. She was joined by Don Kennedy, who, on November 1, 2007, became the district’s Chief Financial and Operations Officer. In his newly configured position, Mr. Kennedy took leadership responsibility for the district’s business functions of the Capital Projects Program, Enrollment, Facility Services, Finance, Information Technology, Planning, Procurement, and School Support Services—among other district functions.

In a matter of just a few months after their appointments, Dr. Goodloe-Johnson and Mr. Kennedy requested that the Council assemble a series of Strategic Support Teams to review and evaluate the leadership and management, organization, and operations of the district’s business functions; and to develop recommendations that would help the district achieve greater operational efficiencies and effectiveness. As the Strategic Support Teams moved forward with their reviews, the Council observed that the Superintendent and Mr. Kennedy began using the Council’s recommendations as they became available to set new directions, change leadership and management as appropriate, and adopt new procedures in the district’s business divisions. The Council believes that the superintendent and the chief operations/finance officer are on the right track and, in time, should be able to substantially improve district operational efficiency and effectiveness.

APPENDIX A. STRATEGIC SUPPORT TEAM

TRANSPORTATION OPERATIONS TEAM

John P. Fahey

John Fahey is the Assistant Superintendent of Service Center Operations for the Buffalo City School District, a position that he has held since 1992. His primary responsibility is administration of the district's pupil transportation program, currently transporting 27,000 students daily on yellow buses and 10,000 students on public transit. His position also includes responsibility for other support services, including the central warehouse, fleet maintenance and distribution functions. Mr. Fahey also functions as the district's emergency coordinator, providing annual planning, training and emergency response to the district's 140 public, charter, and nonpublic school sites. Prior to this position, he was the Director of Building Repairs for the district. He has an undergraduate degree in architecture from the State University of New York at Buffalo.

Richard Jacobs

Richard Jacobs has been the Director of Transportation for the Boston Public Schools since 1990. The Boston Public Schools' Transportation Department is responsible for providing transportation services to some 45,000 students, including more than 4,000 special needs students who require door-to-door transportation services. Transportation services are provided to more than 300 public and private schools. Mr. Jacobs has developed contract specifications for the operation of school transportation services, insurance advisory services, purchase of school vehicles, routing/transportation consulting, and audit services. As chairperson for the City of Boston/Boston Public Schools Transportation Task Force, Mr. Jacobs has lead responsibility for the development of contracts for the overall management and operation of the Schools' transportation system. Mr. Jacobs holds a Bachelor of Science degree in secondary education and political science from Boston State College.

David Palmer

David Palmer, Deputy Director of Transportation for the Los Angeles Unified School District (LAUSD), is a thirty-five year veteran of the school bus industry. The LAUSD Transportation Branch is responsible for the daily transportation of over 60,000 students on 2,000 school buses into over 800 schools and canters. Additionally, the LAUSD Transportation Branch maintains the District's fleet, which exceeds 3,300 vehicles. Mr. Palmer, who is also an instructor in the School Business Management Certificate Program at the University of Southern California, enjoys a strong background in budget development and oversight, contract administration, implementation of performance standards, benchmarks, accountabilities, and in the facilitation of collective bargaining and grievance resolution. Mr. Palmer serves on various committees within the District including New School Openings and Emergency Operations.

Dan Roberts

Dan Roberts is the Executive Director of Business Support Systems for Round Rock ISD a suburb of Austin, Texas. Round Rock ISD won the prestigious E.G. “Lee” Lawson quality award in 2004. Previously, he was Director of Transportation for Austin ISD and has 30+ years of experience in school transportation. Dan was awarded "Leader of the Year" by the Texas Association for Pupil Transportation, served as the association President, and been awarded their lifetime achievement (Honoree) award. He is a certification instructor for both the Texas Association for School Business Officials and Texas Association for Pupil and a speaker for the School Transportation News Conferences for several years. He is a permanent member of the Texas Department of Public Safety “School Bus Specifications” Committee, writing school bus specifications for Texas. Dan works as a consultant in demographics, school boundaries, and transportation management averaging 15 to 20 districts per year across the country.

Alexandra H. Robinson

Alexandra H. Robinson is the Director of Transportation Services for the San Diego Unified School District, the second largest school district in California. In addition to her responsibilities for over 700 employees and the operation and maintenance of over 1,000 vehicles, Alexandra is also responsible for \$34 million in budgetary oversight while transporting over 23,000 students daily. Alexandra has been involved in the school transportation industry for over 17 years at both the State and local levels. Alexandra's background includes work in legal issues and Special Education. She worked with the Florida Department of Education as the Supervisor of Special Education Transportation for the State prior to her current position. Alexandra is currently the Western Region Director for the National Association for Pupil Transportation (NAPT), and the Vice President of the California Association of School Transportation Officials (CASTO). Alexandra received her undergraduate degree from Rollins College and holds a Masters of Education in Administration from the University of Hartford.

CAPITAL PROGRAMS TEAM

Erik Blum

Erik Blum is the Director of Facilities Support Services for the Los Angeles Unified School District. As Director, he leads the organization that provides core business functions for the entire Facilities Services division, including financial operations and oversight of the \$20-billion capital improvement program. At the District, Blum was formerly the Director of Program Controls in the New Construction branch. In this role, he directed program-level financial management and controls for the \$12 billion New Construction program. He successfully rolled out several key program and project management systems that enabled best-practice program controls procedures and provided relevant management information at all levels of the organization. Blum's prior experience includes six years as a project manager at Fluor Corporation, one of the world's largest, publicly owned engineering, procurement, construction, and maintenance

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services companies. He holds a Bachelor of Science degree in Civil Engineering from Stanford University, as well as a Master of Science degree in Construction Engineering and Management, also from Stanford. He is a registered Professional Engineer in California.

Dan Burns

Dan Burns is the Chief Operating Officer for the Cleveland Municipal School District. Mr. Burns is responsible for all Business Operations and heads the district's 1.5 billion dollar capital building project. Mr. Burns is the former Chief Business Manager for the Toledo Public Schools where he was responsible for all Business Operations and their 820 million dollar capital building project.

Joe Edgens

Joe A. Edgens is the Executive Director, Facilities and Operations for the Metropolitan Nashville Public Schools. Mr. Edgens was born in Nashville and graduated from the Nashville Public Schools. He graduated from the University of Tennessee in Knoxville with a Bachelor of Architecture degree as a member of the first graduating class from the School of Architecture at the University of Tennessee. Mr. Edgens has been licensed to practice architecture since 1974. He spent fourteen years in private architectural practice, the last three of which he had his own practice. In 1983 Mr. Edgens sold out of his private practice. He then worked for a contractor/developer for six years as Director of Planning and Construction. Mr. Edgens accepted the position of Director of Planning and Construction with the Metro Board of Public Education in March of 1989. In 1995 Joe was appointed to the position of Executive Director of Facilities and Operations. The Departments under his supervision are Planning and Construction, Maintenance, Operations (custodians and grounds), Transportation, and ADA Compliance. These Departments have over 1550 employees and operating budgets exceeding \$74,000,000.

Richard Moore

Richard W. Moore, P. E. is the Director of Facilities and Maintenance Services for the Milwaukee Public Schools in Milwaukee, Wisconsin. Milwaukee Public Schools (MPS) is the largest K-12 school district in Wisconsin, serving over 88,000 students with 10,782 educators, administrators and other staff in over 165 locations with an annual budget of over \$1.1 billion. MPS is an urban decentralized school district with ethnic diversity: 57.8% of the students are African-American; 12.8% White; 21.1% Hispanic; 4.4% Asian; 0.8% Native American; and 3.1% other non-White. Over 77% of the students receive free or reduced price lunch. Additionally, 33% of the children between the ages of 5-17 in the City of Milwaukee live in poverty. As the Director of Facilities and Maintenance Services, Mr. Moore is directly responsible for all facility planning, building maintenance, school design and renovations, repairs, new construction, environmental services and plant operations of over 200 facilities totaling 18 million square feet of building space. His responsibilities also include development and management of the districts capital improvement program, real estate acquisitions and dispositions along

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with energy management activities. He has over 30 years of experience in design and all aspects of facility management. Mr. Moore has served as an advisor on the State of Wisconsin's Energy Initiative Committee as well as serving on the editorial advisory boards of various publications. He received his Bachelor of Science Degree in Civil Engineering from Michigan Technological University and is a licensed Professional Engineer in the State of Wisconsin.

Steve Young

Steve Young is Chief, Facilities Management with Indianapolis Public Schools (IPS), the largest school district in Indiana with a student enrollment of over 35,000. The Facilities Management Division is comprised of over 400 craft and custodial employees responsible for the maintenance and repair of 101 district buildings. IPS is in the 5th year of a 10-year, \$832 million Capital Improvements Program (CIP). The CIP includes the construction of 10 new elementary schools and the renovation of the remaining 69 schools in the district. Prior to coming to IPS in 1998, Mr. Young was the Manager of Facilities at Fort Sam Houston, the U.S. Army Medical Command Headquarters and Training Center in San Antonio, Texas. He has also served as a Manager of Military Construction for the Army Corps of Engineers in San Antonio. He began working for the Corps of Engineers in 1984 after serving for 12 years in the U.S. Air Force as a Fighter Pilot and Flight Training Instructor.

MAINTENANCE & OPERATIONS TEAM

Neil Gamble

Neil Gamble is the Director of Maintenance and Operations for the Los Angeles Unified School District, the nation's second largest public school system with 1100 sites over an area of 704 square miles. Mr. Gamble's responsibilities include management of policies, procedures and resources for eight Local District Maintenance and Operations Areas providing services to 874 K-12 schools. The M&O budget for LAUSD exceeds \$500 million per year in support of over 6,000 total M&O employees. Mr. Gamble has over 27 years of experience in facilities management and construction in the public sector. He graduated from North Carolina State University with a Bachelor of Science in Civil Engineering. He also holds a Master of Engineering Degree in Construction Management from the University of Florida, and a Master of Arts Degree in National Security and Strategic Studies from the Naval War College. He also completed the Executive Management course at the University of Michigan Business School. Mr. Gamble is a Professional Engineer in the states of California and Minnesota.

Paul Gerner

Paul Gerner is the Assistant Superintendent for the Facilities Division of the Clark County School District, Nevada, the nation's 5th largest and fastest growing school district. Mr. Gerner is a registered Professional Engineer, a Certified Energy Manager, and Green Building Engineer. He manages a workforce of more than 1600 professionals

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including engineers, architects, maintainers, custodial workers, and project managers executing a \$291M annual general fund budget and over \$500M in annual construction and renovation. Clark County School District recently won the Cashman Good Government award for its highly successful energy conservation program, saving nearly \$10M last year. With a unique “multiple sourcing” competitive approach to prototype schools designs, Clark County has been recognized as a leader in the push for more energy efficient and educationally effective schools. Mr. Gerner holds a BA in engineering from the University of Missouri and a Masters in Financial Management from the Naval Postgraduate School, Monterey, California.

Charles Hollar

Charles Hollar is the Director of Buildings and Grounds for the Columbus City Schools in Ohio. Mr. Hollar has worked for the District for 33 years, 15 on the academic side of the house and the last 18 on the support side. The Department of Buildings and Grounds consists of facility maintenance, custodial services and energy and environmental services. Mr. Hollar has responsibility for approximately 750 employees and a \$60 million dollar budget. The District has 10 million square feet of buildings, 5 million square feet of roofs, 1600 acres of ground, and 1.6 million square yards of asphalt. The District has 54,000 students and 150 occupied facilities. Mr. Hollar holds a BS in Education and an MA in Educational Administration, both from The Ohio State University. Mr. Hollar is a Certified Energy Manager, A member of the Association of Energy Engineers, the Association of Facility Engineer, the American Society of Civil Engineers, the Council of Educational Planners International and the Association of School Business Officials International.

Bruce Husson

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

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School Business Administration from Pepperdine University. He also has earned the California Association of School Business Officials Chief Business Officer Certification.

Tom Lindner

Tom Lindner is Executive Director of the Physical Plant Operations Division for the Broward County Schools, Florida. He is responsible for Facility and Grounds maintenance, minor capital outlay, utility management and support services for the nation's 6th largest School District. Prior to assuming his current position, Mr. Lindner served as National Director of Facilities at two different Fortune 100 corporations after a successful career in the United States Navy. During his military career, he held various engineering and personnel management positions, including a tour as Commanding Officer of the Destroyer USS JOHN HANCOCK. He holds a Bachelor of Science degree (with distinction) in Engineering from the United States Naval Academy and a Master of Science degree (with distinction) in Management from the Naval Postgraduate School.

Michael Turza

Michael Turza has been the Director of Business Services for the Milwaukee Public Schools since 1997. In this capacity, he manages facilities, pupil transportation, food services, procurement, telecommunications, and warehouse and delivery services. Mr. Turza has been with the Milwaukee Public Schools since 1987, and has served in a variety of positions over the years. Prior to joining the Milwaukee Public Schools, he worked for Ecotran Corporation as an account executive. He holds an M.A. degree in human resources from Marquette University, an M.B.A. from Baldwin-Wallace College, and a B.A. degree from Cleveland State University.

PROJECT STAFF

Robert Carlson

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

David W. Koch

David Koch is the former Chief Administrative Officer for the Los Angeles Unified School District (LAUSD). The LAUSD is the nation's second largest public school system, with more than 700,000 students in grades K-12, an annual budget of more than \$9 billion, and more than 80,000 full- and part-time employees. Mr. Koch's responsibilities encompassed virtually all non-instructional operations of the district, including finance, facilities, information technology, and all of the business functions. Mr. Koch also served the LAUSD as business manager, executive director of information services, and deputy controller. Mr. Koch was also business manager for the Kansas City, Missouri Public School District and was with Arthur Young and Company prior to entering public service. He is a graduate of the University of Missouri and a Certified Public Accountant in the states of California, Missouri, and Kansas. Currently a resident of Long Beach, California, Mr. Koch provides consulting services to public sector clients and companies doing business with public sector agencies.

APPENDIX B. INDIVIDUALS INTERVIEWED

Individuals Interviewed by the Transportation Team

- Don Kennedy, Chief Operations and Financial Officer
- Ammon McWashington, Director of School Services
- Dave Anderson, Transportation Manager (retiring)
- Tom Bishop, Transportation Manager (new)
- Frances North, Supervisor Intervention Program
- Annette Noriega, Intervention Associate
- Dana Bland, Intervention School Bus Driver
- Chris Thomas, Bus Supervisor – SPED
- Evelyn Green, Intervention Associate
- John Jackson, Intervention Associate
- Michele White, Intervention Associate
- Neil Smith, Intervention Associate
- Ransom Pittman, Intervention Associate
- Roxanne Fashaw, Intervention Associate
- Sharron Peterson, Intervention Associate
- Frances North, Supervisor Intervention Program
- Annette Noriega, Intervention Associate
- Dana Bland, Intervention School Bus Driver
- Chris Thomas, Bus Supervisor – SPED
- Evelyn Green, Intervention Associate
- Neil Smith, Intervention Associate
- Roxanne Fashaw, Intervention Associate
- Sharron Peterson, Intervention Associate
- John Jackson, Intervention Associate
- Ransom Pittman, Intervention Associate
- Katie Hairston, Transportation Specialist
- Gary Peters, Transportation Specialist
- Angelo Portomene, Transportation Specialist
- Cheryl Martin, Transportation Specialist
- Teresa Mori, Transportation Specialist
- Paula Mori, Hourly Employee
- August Ramirez , Co-Coordinator Assistant - Spanish Translator
- Steve Richard, Hourly Employee
- Karen Freeman- Krenzer, Work Flow

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- Dorothy Brennan, Work Control Operator
- Julie Repie, Office Specialist
- Diane Cagot, Work Control Operator
- Lorraine Hulett, Data Analyst
- Ellen Reyes, Sr. Transportation Analyst
- Pam Goldfine, Headstart Coordinator
- Tracy Libros, Enrollment Planning
- Linda Sebring, Director, Budgeting
- Dale Askew, NW Regional Financial Controller, First Student
- Gail Heaton, Contract Manager, First Student
- Richard Anzai, Special Education Transportation Supervisor
- Shawn Weaver, SPED Transportation Coordinator
- Pete Tsuchikawa, Transportation Specialist (SPED)
- Chris Namba, Transportation Supervisor
- Margaret Purcell, RAIN Project
- Jill Lewis, Program Manager
- Pat Hunter, Principal
- Greg Foster, Head Teacher
- Lupe R. Barnes, Assistant Principal
- Elnora Hookfin, Assistant Principal
- Cathy Thompson, Principal
- Phil Brockman, Principal

Individuals Interviewed by the Capital Programs Team

- Don Kennedy, Chief of Finance and Operations
- Fred Stephens, Director of Facilities
- Don Gillmore, BEX Program Manager
- Marques Bailey, Relocation Planner
- Earl Edwards, Construction Project Engineers
- Dan Schnabel, Construction Project Engineers
- Martha Turnbull, Construction Project Engineers
- Sunan Wei, Construction project Manager*
- Michael Romero, Construction project Manager*
- Steven Moore, Construction project Manager*
- Ian Kell, Construction project Manager*
- Konnie Surmann, Construction project Manager*
- Tracy Sitla, Construction project Manager*
- John McWilliams, Construction project Manager*
- Dan Brown, Construction project Manager*
- Robert Evans, Construction project Manager*

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

- Ronic Lirio, Finance Department, Accounting Manager
- Ann Chui, Capital Project Accountant
- Lucy Morello, BTA Program Manager
- Jeannette Imanishi, Construction Project Supervisor
- Mike Skutack, Construction Project Supervisor
- David Standaart, Construction Project Supervisor
- Geoff Sutton, Construction Project Supervisor
- Ron English, Deputy General Counsel
- John Palewicz, BEX Programs Oversight Committee
- Patti Spencer, Communications Manager
- Regina Glenn, President, Pacific Communications Consultants
- Kathy Johnson, Manager of Facilities Planning
- Gretchen DeDecker, Self Help Projects
- Tingyu Wang, Facilities Planning Analyst
- Paul Wozniak, Senior Facilities Planner
- Donald King, President DKA
- Ralph Rohwer, Vice President, Heery International
- Mike Finnegan, Program Director, Heery International
- Chuck Clegern, Assistant Program Director, DKS
- Jim Ratchford, Director, Technology
- Richard Rogers, Project Manger
- Eric Sonnet, Manager of Facilities Finance
- Denise McElhinney, Management Analyst
- Ellen Novitski, Cost Support Analyst
- Linda Sebring, Finance Department, Budget Manager

* Contracted Construction Project Managers are employees of Heery International, Inc. or Don King Associates

Individuals Interviewed by Maintenance and Operations Team

- Don Kennedy, Chief of Finance and Operations
- Fred Stephens, Director of Facilities
- Lynn Good, Senior Manager, Facilities Services
- Mark Pflueger, Manager, Maintenance Services
- Fred Pamonag, Manager, Work Management Services
- Bruce Skowyra, Manager, Custodial Services
- Frank Griffin, Senior Supervisor, Environmental Services
- Helen Jones, Accounts Payable
- Jason Viers, Construction Records Services
- Christie Ross, Work Control Specialist
- Esper Obenza, Work Control Analyst
- Karen Fleury, Management Analyst
- Lisa Noyes, Accounting Specialist

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

- Robert Chiovarie, Asbestos Foreman
- Tom Thoreen, Brickmason Foreman
- Mike Jackson, Electronics Foreman
- Ed Dayton, Glaziers Foreman
- Roger Mayfield, Shades Foreman
- _____, Lockshop Foreman
- LaDonia Skinner, Custodial Supervisor
- Mike Stewart, Senior Custodial Supervisor
- Shelly Ward, Custodial Supervisor
- Dan Bryant, General Foreman
- Eric Sonnet, Manager of Facilities Finance
- Steve Kirschner, Foreman, Carpenters
- DanThorlakson, Foreman, Paint Shop
- Dan Carter, Foreman, Auto Shop
- Gaylord McMurrin, Foreman, Sheet Metal
- Beth Dolan, Resource Conservation Specialist
- Nicole Riss, Resource Conservation Specialist
- Mike Kennedy, Mechanical Coordinators
- Fernando Luna, Mechanical Coordinator Trainee
- Mike McBee, Mechanical Coordinator
- Roland Killian, Gardner Foreperson
- Brian Helm, Custodial Engineer of Closed Buildings
- Dave Westberg, Business Manager, International Union of Operating, Engineers, Local 609
- Chris Elwell, Executive Secretary, Seattle/King County Building and Construction Trades Council
- Martin Callaghan, Principal
- Ted Howard, Principal
- Cindy Ortega, Principal
- Terri Skjei, Principal

Schools Visited by Maintenance and Operations Team

- Aki Kurose Middle School
- Eckstein Middle School
- Franklin High School
- Hale High School
- Mercer Middle School
- Olympic View Elementary
- Roosevelt High School
- Sacajawea Elementary School
- Summit K-12

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

- Van Asselt Elementary
- West Seattle High School
- Whitworth Elementary

APPENDIX C. DOCUMENTS REVIEWED

Documents Reviewed by the Transportation Operations Team

- An Analysis of Transportation Service for the Seattle Public Schools, Management Partnership Services, Inc., August 2006, and cover letter dated August 11, 2006
- Current Transportation Organization Chart and related staff listing
- Proposed Transportation Organization Chart and related staff listing
- SPS Organization Chart
- Transportation Service Standards 2008-09, Effective 9/1/2008
- Detail of FTE and Budget Activity, FY2007, 4/21/2008
- Detail of FTE and Budget Activity, FY2008, 4/21/2008
- F-196 Annual Financial Statements For Fiscal Year 2006-2007
- F-196 Annual Financial Statements For Fiscal Year 2005-2006
- Incident report (Sample)
- Control Center Procedures Handbook.
- Contract no. RFP01716 between SPS and First Student, Inc.
- 2008-2009 Transportation Contract Extension for RFP01716, April 15, 2008
- State transportation funding comparison with ten other Washington school districts
- 2007-2008 School Year Transportation Service Requests
- School Program Listing, with Start and Dismissal Times
- Full Route Listing
- Bus Fleet Listing
- Walk to Stop Distance for 1,930 First Graders

Documents Reviewed by the Capital Programs Team

- Washington State Auditor's Office, Financial Statements and Federal Single Audit Report, September 1, 2004 through August 31, 2005
- Washington State Auditor's Office, Financial Statements and Federal Single Audit Report, September 1, 2005 through August 31, 2006
- FY08 Adopted Budget and Actual Encumbrances & Expenditures – Capital Budget
- F-196 Annual Financial Statements for Fiscal Year 2006-200
- F-196 Annual Financial Statements for Fiscal Year 2005-2006
- District Strategic Plan ("Excellence For All"), June, 2008
- Seattle Public Schools 2020 Facilities Master Plan, March 26, 200
- Detail Capital Program listing
- Facilities and Capital Staffing Rosters
- Facilities and Capital Organizational Charts
- State Assistance for School Construction, D-Forms "101"
- State Assistance Process for School Construction, D-Form process Workbook, April, 2000

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

- Program Procedures Manual, MICS Procedures, April 2005
- Program Procedures Manual, Design Phase Procedures, September, 2001
- Program Procedures Manual, Construction Procedures, May 2005
- Management Plan, BEX II, Update September, 2004
- BEX III Communications & Community Engagement Plan,
- SPS School Design Process, January, 2002
- School Project Brochures
- Building Excellence III, Monthly Status Report, May 2008
- DP2 system (example: Cleveland High School) – Project Cost Summary. Invoice Register, Project Reconciliation, Project Budget Transfer Summary, and Change Order Summary.
- SPS Design and Materials Standards Manual
- SPS Board Policies, Maintenance and Capital Projects
- Heery International Inc. Personal Services Contract
- DKA Services Contract
- Sample Architects Contract
- Sample Construction Contract
- BEX III Community Engagement Plan Update, June 18, 2008
- Framework For Revised Student Assignment Plan, Approved June 20, 2007
- Proposed Use of Student/Teacher Ratios, DRAFT November 2, 2007
- SPS Enrollment Projections Report, DeJONG, Inc., February 20, 2008
- Construction Project Engineers and Relocation Planner, School Assignments and Responsibilities, 2/4/2008
- Maintenance Staffing and Funding by Year and Total Square Footage, 3/15/08
- SPS Maintenance Funding Compared to State Average, 2/1/08
- Maintenance Staffing and Funding by Year and Total Square Footage, 3/6/08
- 20Year CEP Budget, 4/26/08
- SPS Capital Contract Financial Process, 6/5/08
- Invoice Process for Small Works/Hubs Vendors
- Contract related Document Outstanding Status, 6/17/08
- Construction Management Fees - Summary, 6/17/0
- Summary of Capital Fund FTE and Budget Activity, 6/17/08
- FTEs charged to Capital Programs, 6/17/08
- Building Condition and Program Evaluation Project, February 10, 2006

Documents Reviewed by the Maintenance and Operations Team

- District Strategic Plan (“Excellence For All”), June, 2008
- Seattle Public Schools 2020 Facilities Master Plan, March 26, 2008
- Facilities Services Org Chart – Revised 5/27/2008
- Work Management System – Work Order Priority Codes
- Fleet Administration – Recommended Policy & Procedure Changes (June 16, 2008)
- Facilities Finance Office and Clients, 10/08/07
- Maintenance Staffing and funding by Year and Total Square Footage, 3/6/08

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- SPS Maintenance Funding Compared to State Average, 2/1/08
- Maintenance Staffing and Funding by Year and Total Square Footage
- Natural Resources Conservation Policy
- Natural Resources Conservation Procedures
- Change in Natural Resource Use 2006/2007 Final Summary, March 21, 2008
- Board Resolution 2006/2007 – 18 (Re: Commitment to reduce natural resource consumption)
- Work Management Systems Workgroup Codes
- (Custodial Formula) Times Allowed for Cleaning Areas, 609 Contract
- Seattle Public Schools Condition Survey 2005, Meng Analysis 2-10-06
- Facilities Structural Study, Putman Collins Scott Associates, January 31, 2006

APPENDIX D. WORKING AGENDAS

**Strategic Support/Technical Assistance Team
Transportation Operations
Seattle Public Schools
May 20-23, 2007**

**Working Agenda (Tentative)
Subject to Change as Required**

Contact: Donald Kennedy
Chief of Finance and Operations
Cell: 206.793.0120
Office: (206) 252-0087
Email: drkennedy@seattleschools.org

Tuesday, May 20, 2008

Team Arrival
Vintage Hotel
1100 Fifth Avenue
Seattle, WA 98101
206.624.8000

6:15 p.m.

Team to Meet in Hotel Lobby

6:30 p.m.

Dinner Meeting

Donald Kennedy
Chief of Finance and Operations

Wednesday, May 21

7:00 - 8:00 a.m.

Continental Breakfast
John Stanford Center for Educational Excellence
Seattle Public Schools
2445 3rd Avenue South

8:00 - 9:15 a.m.

Team Meeting

Ammon McWashington
Manager

Assistant Manager
Transportation Department

9:30 - 10:45 a.m.

Team Meeting

Supervisors
Special Services
Elementary Services
Secondary Services
Intervention Services

11:00 - 12:15 p.m.

Team Meeting

**Data Management/Sys Analyst
Sr. Trans Analyst.**

12:30 - 1:30 p.m.

Working Luncheon

1:30 - 2:45.m.

Team Meeting

**Work Ctrl Operators
Hourly Control Center Support
Office Specialists**

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

2:45 - 4:00 p.m.	Team Meeting	Work Group Trans Specialist Fleet Supervisor Jamie Jones-Luster , Routing Supervisor Paul Guyn , Garage Supervisor
4:00 - 5:15 p.m.	Team Meeting	Intervention Associates
5:30 p.m.	Team Discussion of Work Plan for Balance of Site Visit	

Thursday, May 22

6:30 - ____ a.m. **Site Visits**

Please note that the team wants to visit the bus yards prior to morning departures and when students are unloaded are random school sites. The team also wants to visit the radio dispatch location(s) and the bus garage(s). We will leave it to SPS to schedule the visits and the opportunity to visit with staff between 6:30 a.m. and noon.

12:00 - 1:00 p.m.	Working Luncheon	
1:00 - 2:15 p.m.	Team Meeting	Union Representatives
2:30 - 4:00 p.m.	TBD	
4:00 - 5:00 p.m.	Team Meeting	Principals <i>Randomly Selected</i>
5:30 p.m.	Team Discussion of Work Plan for Balance of Site Visit	

Friday, May 23

7:00 - 8:00 a.m.	Continental Breakfast	
8:00 - 12:00 Noon.	Team Meeting	Discussion of Findings & Recommendations
12:00 - 1:00 p.m.	Working Luncheon Debriefing	Donald Kennedy Others TBD
1:00 p.m.	Adjournment & Departures	

**Strategic Support/Technical Assistance Team
Facilities Capital
Seattle Public Schools
June 15-18, 2008**

**Working Agenda (Tentative)
Subject to Change as Required**

Contact: Donald Kennedy
Chief of Finance and Operations
Cell: 206.793.0120
Office: (206) 252-0087
Email: drkennedy@seattleschools.org

Fred Stephens
Director, Facilities Department
Cell: 206-396-6105
Office: 206-252-0636

Julie Krick
Senior Administrative Assistant, Facilities Department
Cell: 206-396-2472
Office: 206-252-0644

Sunday, June 15, 2008

Team Arrival
Vintage Hotel
1100 Fifth Avenue
Seattle, WA 98101
206.624.8000

6:15 p.m.

Team to Meet in Hotel Lobby

6:30 p.m.

Dinner Meeting

Monday, June 16

7:00 - 8:00 a.m.

**Continental Breakfast, w/
Don Kennedy**, Chief of Finance and Operations, and
Fred Stephens, Director of Facilities
John Stanford Center for Educational Excellence
Seattle Public Schools
2445 3rd Avenue South
Seattle, WA 98134

8:00 - 9:00 a.m.

Team Meeting

Don Gillmore
BEX Program Manager

9:15 - 10:30 a.m.

Team Meeting

Marques Bailey
Relocation Planner
Larry Matsuda
Consultant to Principal
Earl Edwards
Dan Schnabel
Martha Turnbull
Construction Project Engineers

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

10:45 - 11:45 a.m.	Team Meeting	Linda Sebring Budget Manager Ronic Lirio Finance Department Accounting Manager Kathie Technow
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12:00 - 1:00 p.m.	Working Luncheon
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1:00 - 2:00 p.m.	Team Meeting	Lucy Morello BTA Program Manager
2:00 - 3:15 p.m.	Team Meeting	Sue Cromarty Jeannette Imanishi Mike Skutack David Standaart Geoff Sutton Construction Project Supervisors
3:15- 4:00p	Team Meeting	Bridgett Chandler Director, Communications Regina Glenn President, Pacific Communications Consultants
4:00 - 5:15 p.m.	Team Meeting	Ron English Deputy General Counsel, Seattle Schools Ed Peters BEX Programs Oversight Committee Director, Capital Projects Edmonds School District Karin Nyrop BEX Programs Oversight Committee Asst. Attorney General University of Washington

5:30 p.m.	Team Discussion of Work Plan for Balance of Site Visit
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Tuesday, June 17

7:00 - 8:00 a.m.	Continental Breakfast	
8:00- 9:00 a.m.	Team Meeting	Kathy Johnson Manager of Facilities Planning
9:15- 10:30 a.m.	Team Meeting	Gretchen DeDecker Self Help Projects Tingyu Wang Facilities Planning Analyst Paul Wozniak Senior Facilities Planner
10:45a- 12:00 p.m.	Team Meeting	Construction Management DKA Donald King President Project Managers

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

Heery International
Bruce Herr
 Area Manager
Mike Finnegan
 Operations Manager
Project Managers

12:00 - 1:00 p.m.	Working Luncheon
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1:00 - 2:00 p.m.	Team Meeting	Eric Sonett Manager of Facilities Finance
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2:15 - 3:30 p.m.	Team Meeting	Karen Fleury Management Analyst Denise McElhinney Management Analyst Ellen Novitski Cost Support Analyst Lisa Noyes Jolene Taylor Sai Vang Accounting Specialist IIs
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3:45 - 5:00 p.m.	Team Meeting <u>High Schools</u> Cleveland, Wayne Floyd Chief Sealth, John Boyd Garfield, Ted Howard, Jr. South Lake, Barbara Moore <u>Middle Schools</u> Denny, Jeff Clark Hamilton, Katie Hairston Madison, Jill Hudson	Principals
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5:30 p.m.	Team Discussion of Work Plan for Balance of Site Visit
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Wednesday, June 18

7:00 - 8:00 a.m.	Continental Breakfast
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8:00 - 12:00 Noon.	Team Meeting	Discussion of Findings & Recommendations
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12:00 - 1:00 p.m.	Working Luncheon Debriefing	Donald Kennedy Fred Stephens
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1:00 p.m.	Adjournment & Departures
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**Strategic Support/Technical Assistance Team
Facilities Operations
Seattle Public Schools
June 22-25, 2008**

**Working Agenda (Tentative)
Subject to Change as Required**

Contact: Donald Kennedy
Chief of Finance and Operations
Cell: 206.793.0120
Office: (206) 252-0087
Email: drkennedy@seattleschools.org

Fred Stephens
Director, Facilities Department

Julie Krick
Senior Administrative Assistant, Facilities Department

Sunday, June 22, 2008

Team Arrival
Vintage Hotel
1100 Fifth Avenue
Seattle, WA 98101
206.624.8000

6:15 p.m.

Team to Meet in Hotel Lobby

6:30 p.m.

Dinner Meeting

Donald Kennedy
Chief of Finance and Operations
Fred Stephens
Director, Facilities Department

Monday, June 23

7:00 - 8:00 a.m.

Continental Breakfast
John Stanford Center for Educational Excellence
Seattle Public Schools
2445 3rd Avenue South

8:00 - 9:15 a.m.

Team Meeting

Lynn Good
Facilities Services

9:30 - 10:45 a.m.

Team Meeting

Bruce Skowrya
Custodial Services
Mark Pflueger
Maintenance Services
Fred Pamonag
Work Management Services
Frank Griffin
Environmental Services

11:00 - 12:15 p.m.

Team Meeting

Eleanor Lockett
Building Rentals
Brian Helms

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

Closed Buildings
Helen Jones
 Accounts Payable
Jason Viers
 Construction Records Svcs.
Christie Ross
Pam Wittman
 Work Cntr. Specialists
Esper Obenza
 Work Order Analyst

12:30 - 1:30 p.m.	Working Luncheon
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1:30 - 2:45.m.

Team Meeting

Marc Walsch
 Construction Project Supv.
Dan Bryant
 General Forman
B. Chiovarie
D. Carter
T. Thoreen
S. Kirschner
B. Wickersham
M. Jackson
E. Dayton
C. Ellis
P. Jerzak
J. Fairbanks
D. Thorlakson
T. Gustin
J. Ulavale
M. McMurrin
 Maintenance Shops
Charles Zayas
 Musical Instrument Repair
Mike Hutchens
 Office Machine Repair
Roger Mayfield
 Shade Shop

2:45 - 4:00 p.m.

Team Meeting

Pat Chan
LaDonia Skinner
Mike Stewart
Shelly Ward
 Custodial Supervisors

4:00 - 5:15 p.m.

Team Meeting

Roland Killiam

5:30 p.m.	Team Discussion of Work Plan for Balance of Site Visit
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Tuesday, June 24

7:00 - 8:00 a.m.

Continental Breakfast

<p>Please note that the team wants to visit schools (elementary, middle, and high schools) that fairly represent a cross-section of the district's building conditions. The team also wants to visit the maintenance shop if there is a central location.</p>
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12:00 - 1:00 p.m.	Working Luncheon
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1:00 - 2:00 p.m.

Team Meeting

Beth Dolan
Nicole Riss
 Resource Conserv. Specialists

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

Mike Kennedy
Fernando Luna
Mike McBee
 Mechanical Coord.

2:15 - 3:30 p.m.

Team Meeting

Union Representatives

3:45 - 5:00 p.m.

Team Meeting

Principals
Randomly Selected

5:30 p.m.	Team Discussion of Work Plan for Balance of Site Visit
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Wednesday, June 25

7:00 - 8:00 a.m.

Continental Breakfast

8:00 - 12:00 Noon.

Team Meeting

Discussion of Findings & Recommendations

12:00 - 1:00 p.m.

Working Luncheon
Debriefing

Donald Kennedy
 Others TBD

1:00 p.m.

Adjournment & Departures

APPENDIX E. ABOUT THE COUNCIL

Council of the Great City Schools

The Council of the Great City Schools is a coalition of 66 of the nation's largest urban public school systems. Its Board of Directors is composed of the Superintendent of Schools and one School Board member from each member city. An Executive Committee of 24 individuals, equally divided in number between Superintendents and School Board members, provides regular oversight of the 501(c) (3) organization. The mission of the Council is to advocate for urban public education and assist its members in the improvement of leadership and instruction. The Council provides services to its members in the areas of legislation, research, communications, curriculum and instruction, and management. The group convenes two major conferences each year; conducts studies on urban school conditions and trends; and operates ongoing networks of senior school district managers with responsibilities in areas such as federal programs, operations, finance, personnel, communications, research, and technology. The Council was founded in 1956 and incorporated in 1961, and has its headquarters in Washington, D.C.

Strategic Support Teams Conducted by the Council of the Great City Schools

City	Area	Year
Albuquerque		
	Facilities and Roofing	2003
	Human Resources	2003
	Information Technology	2003
	Special Education	2005
	Legal Services	2005
	Safety and Security	2007
Anchorage		
	Finance	2004
Birmingham		
	Organizational Structure	2007
	Operations	2008
Broward County (FL)		
	Information Technology	2000
Buffalo		
	Superintendent Support	2000
	Organizational Structure	2000
	Curriculum and Instruction	2000
	Personnel	2000
	Facilities and Operations	2000
	Communications	2000
	Finance	2000
	Finance II	2003
Caddo Parish (LA)		
	Facilities	2004
Charleston		
	Special Education	2005
Charlotte-Mecklenburg		
	Human Resources	2007
Cincinnati		
	Curriculum and Instruction	2004
Christina (DE)		
	Curriculum and Instruction	2007
Cleveland		
	Student Assignments	1999, 2000
	Transportation	2000
	Safety and Security	2000
	Facilities Financing	2000
	Facilities Operations	2000
	Transportation	2004

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

	Curriculum and Instruction	2005
	Safety and Security I	2007
	Safety and Security II	2008
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
Dallas		
	Procurement	2007
Dayton		
	Superintendent Support	2001
	Curriculum and Instruction	2001
	Finance	2001
	Communications	2002
	Curriculum and Instruction	2005
	Budget	2005
Denver		
	Superintendent Support	2001
	Personnel	2001
	Curriculum and Instruction	2005
	Bilingual Education	2006
Des Moines		
	Budget and Finance	2003
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
	Procurement	2008
Greensboro		
	Bilingual Education	2002

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

	Information Technology	2003
	Special Education	2003
	Facilities	2004
	Human Resources	2007
Hillsborough County		
	Transportation	2005
	Procurement	2005
Indianapolis		
	Transportation	2007
Jackson		
	Bond Referendum	2006
Jacksonville		
	Organization and Management	2002
	Operations	2002
	Human Resources	2002
	Finance	2002
	Information Technology	2002
	Finance	2006
Kansas City		
	Human Resources	2005
	Information Technology	2005
	Finance	2005
	Operations	2005
	Purchasing	2006
	Curriculum and Instruction	2006
	Program Implementation	2007
Los Angeles		
	Budget and Finance	2002
	Organizational Structure	2005
	Finance	2005
	Information Technology	2005
	Human Resources	2005
	Business Services	2005
Louisville		
	Management Information	2005
Memphis		
	Information Technology	2007
Miami-Dade County		
	Construction Management	2003
Milwaukee		
	Research and Testing	1999
	Safety and Security	2000
	School Board Support	1999

Review of Transportation, Capital Projects, and Maintenance & Operations of Seattle Schools

	Curriculum and Instruction	2006
	Alternative Education	2007
Minneapolis		
	Curriculum and Instruction	2004
	Finance	2004
	Federal Programs	2004
Newark		
	Curriculum and Instruction	2007
New Orleans		
	Personnel	2001
	Transportation	2002
	Information Technology	2003
	Hurricane Damage Assessment	2005
	Curriculum and Instruction	2006
New York City		
	Special Education	2008
Norfolk		
	Testing and Assessment	2003
Philadelphia		
	Curriculum and Instruction	2003
	Federal Programs	2003
	Food Service	2003
	Facilities	2003
	Transportation	2003
	Human Resources	2004
Pittsburgh		
	Curriculum and Instruction	2005
	Technology	2006
	Finance	2006
Providence		
	Business Operations	2001
	MIS and Technology	2001
	Personnel	2001
	Human Resources	2007
Richmond		
	Transportation	2003
	Curriculum and Instruction	2003
	Federal Programs	2003
	Special Education	2003
Rochester		
	Finance and Technology	2003
	Transportation	2004
	Food Services	2004

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San Diego		
	Finance	2006
	Food Service	2006
	Transportation	2007
	Procurement	2007
San Francisco		
	Technology	2001
St. Louis		
	Special Education	2003
	Curriculum and Instruction	2004
	Federal Programs	2004
	Textbook Procurement	2004
	Human Resources	2005
Seattle		
	Human Resources	2008
	Budget and Finance	2008
	Information Technology	2008
	Bilingual Education	2008
	Transportation	2008
	Capitol Projects	2008
	Maintenance and Operations	2008
Toledo		
	Curriculum and Instruction	2005
Washington, D.C.		
	Finance and Procurement	1998
	Personnel	1998
	Communications	1998
	Transportation	1998
	Facilities Management	1998
	Special Education	1998
	Legal and General Counsel	1998
	MIS and Technology	1998
	Curriculum and Instruction	2003
	Budget and Finance	2005
	Transportation	2005
	Curriculum and Instruction	2007