

Information Item #20

# **Review of Gibson Audit Recommendations**

# Chapter 1

## District Organization & Management

### **Develop a long range strategic plan and related performance measures**

Completed July 2014 (Concise Strategic Plan).

Superintendent's Goals, 2016-17

### **Implement an internal audit function at TUSD that reports directly to the Governing Board**

Completed. Internal Auditor was hired in the Spring of 2017.

### **Maximize the use of available technologies to streamline board meeting management**

TBD.

### **Reorganize instructional and student support services by function**

TBD.

### **Develop a decision-making framework for instructional and school administrators**

TBD.

# Chapter 2

## Financial Management

**Reduce Finance Office staffing after new information systems and re-engineered processes are implemented**

Financial Services reduced a total of 14 FTEs from FY14-15 as compared to FY17-18 resulting in a cumulative savings of \$1.6M which met the recommendation of the efficiency audit.

<b>FTES</b>	<b>FY14-15</b>	<b>FY15-16</b>	<b>FY16-17</b>	<b>FY17-18</b>
<b>Budget</b>	8	8	8	7
<b>Accounting</b>	9	8	9	8
<b>Payroll</b>	13	9	9	7
<b>Student Finance</b>	5	5	5	5
<b>Attendance Acctng</b>	4	4	3	3
<b>Accounts Payable</b>	7	7	7	5
<b>Asset Management</b>	3	3	3	3
<b>Admin</b>	5	3	2	2
<b>Total</b>	<b>54</b>	<b>47</b>	<b>46</b>	<b>40</b>

# Chapter 2 (2/6)

## Reduce Finance Office staffing after new information systems and re-engineered processes are implemented (Pt. 2)

Purchasing was not included in the efficiency audit staff reduction recommendation. However, the Purchasing department staff has also been reduced by 4 FTE resulting in a cumulative savings of \$145k

<b>FTES</b>	<b>FY14-15</b>	<b>FY15-16</b>	<b>FY16-17</b>	<b>FY17-18</b>
Purchasing	12	11	11	8

# Chapter 2 (3/6)

## Improve financial reporting to the board and ensure accessibility of financial reporting to department and school leaders

iVisions ERP was implemented on July 1, 2015

- All users including principals, office managers, department directors and admin assistants were trained on the following:
  - General Ledger reports
  - Budget Control Group report—for cash controlled accounts
  - Accessing Account Detail—to find account level budget, expenditures, encumbrances and ending balances

In FY16-17, Finance developed a formative assessment for all ERP users identifying necessary functionality that each user needs know in order access data and be productive in the system

- The data was collected and presented at an ILA meeting to all principals
- The results were then used to develop more targeted training and other initiatives such as establishing monthly office manager meetings

Formative assessment outcome:

- Based on feedback, Finance created one common customer service phone number that would be accessible to principal after hours for budget assistance
- Accounting analysts are meeting with all site administrators to review budget and spending on a regular basis

As a result, the District spending trend by quarter has improved slightly each year lessen the burden on staff when there is a high volume of 4th quarter spending

Reporting the board

- Monthly budget presentations to the board included a reporting of all district funds to improve transparency that began December 2015
- Budget books have been made available to the public sooner
  - **FY15-16** posted on 12/8/15, **FY16-17** posted on 11/15/16, **FY17-18** draft posted on 6/27/17

# Chapter 2 (4/6)

## Implement the feature in Lawson that checks for available funds for requisitions and budget transfers

When the ERP was implemented in July 2015, the feature called “Budget Checking” was also implemented.

- Budget Checking does not allow the user to submit requisitions without a budget being available in the account being accessed
- In FY15-16, grants operating Budget Checking on a grouping basis, meaning if the grant had available funds in any account the system did not prevent requisitions from being submitted. However, in FY16-17 grants began operating consistent with the rest of the District.

### Budget Transfers

- Budget transfers became an electronic process beginning in July 2015. These transfers routed electronically through all proper approvals and were posted and made available to sites immediately as opposed to the paper process in prior years that made it difficult for site administrators to access their budget balances.

## Reduce the volume of Personnel Action Forms by eliminating multiple codes for substitutes

### Reducing multiple codes for substitutes

- Prior to the implementation of the new ERP system, the district required Personal Action Forms (PAFs) to be submitted when a daily sub transitioned into a long-term sub rate and the chart of accounts had different object codes for daily subs and long-term subs
- In FY16-17, the District implemented the integration of the Aesop sub system into the ERP and were able to reduce the number of codes for tracking subs

# Chapter 2 (5/6)

## Consolidate district payroll functions under the Chief Financial Officer/Payroll Manager

In July 2015, the Finance department was reorganized to align payroll under the Finance Director

- The reporting structure within the department was adjusted
- New processes were developed and implemented
- As a result, the District has reduced its number of off-cycle check runs and reduced staff by 2 FTE

## Implement bar codes and scanners to more efficiently track fixed assets

- The ERP system was configured to incorporate the District's fixed assets in FY15-16
- The barcode system implementation began in the summer of 2017 and should be completed by the end of FY17-18

## Develop procedures and controls for the district's procurement card program

- Accounts Payable and Purchasing continue to develop procedures and controls to make paying invoices with the District pCard more efficient and effective.
- Both areas continue to maximize the use of pCard as a payment method in the Accounts Payable area in the contracting and payment of vendor invoices
- The rebate from the pCard payment process continues to increase and has been used to support student activities such as band uniforms, athletic equipment/uniforms and fine arts. Most recent rebate was \$912,000 for the past calendar year.
- Financial Leadership and the Purchasing/Payables area continues to explore more efficient ways to streamline the Accounts Payables process by investigating and testing new accounts payable solutions that reduce the risk of fraud to the District. (Commerce Bank Accounts Payable Process using one time use ghost card payment process currently under implementation.)

# Chapter 2 (6/6)

## Expand “Punch-Out” purchasing programs with high volume merchants

- **2011:** Implemented Office Depot Punch-out process with our previous ERP system, Lawson. Successfully transitioned and continued with the Office Depot Office Supplies Punch-out process with current ERP provider, Tyler iVisions
- **July 2016:** Successfully implemented another Punch-out vendor, School Specialty, and their marketplace of vendors (Childcraft, Sportime, Sax Art, Abilations, etc.)
- **Fall 2017/Spring 2018:** Exploring the implementation of other Punch-out vendors in the hardware/industrial supply area.

## Implement performance measures for the Purchasing Department

- Currently tracking statistics related to time requisition to purchase order tracking.
- Prior to Lawson ERP implementation in 2011, paper processing time was over 21 days from requisition to purchase order.
- In FY16-17, the requisition to purchase order process time was reduced to less than one week, with the ability to process a requisition to purchase order in less than an hour, given all required information and approvals.
- Purchasing Department continues to keep statistics
- Number of purchase orders produced
- Total dollar value of purchase orders
- Number of revisions and other pertinent statistics
- Purchasing will continue to explore other means of measuring efficiency and effectiveness in the future and implement/track other factors related to purchasing that influence the entire financial area.



# Chapter 3

## Human Resources

**Reorganize the HR Department, creating a development team that will have no daily routine responsibilities but will instead be focused on the myriad of systems and procedural improvements that are needed in the department**

**Not complete by 2016-17**

- New HR leadership is reorganizing the department to ensure this is on target for completion in 17-18.

**Improve the hiring process in several areas**

Completed by 2015-16

- Implementation of applicant tracking system and reduced time to hire from fast track of 45 days in 2014-15 to an average of 25 days in 2015-16 to an average of 18 days in 2016-17.
- HR will continue to evaluate the hiring process to ensure new efficiencies can be found.

**Conduct dependent eligibility audit**

Not Completed

- Quote and SOW received in 10/15 for the work
- No approval from the Employee Benefits Trust can be found and we have no evidence that the project moved forward

# Chapter 3 (2/4)

## Implement needed changes in leave policies and procedures

### Completed 2015/16 and 2016/17

- Effective 11/1/15 we partnered with a third party to ensure that our FMLA management is DOL compliant and administered consistently.
- FMLA leave has been clearly defined and outlined in a GB policy (GCCA, adopted 9/2015)
- A standardized leave process was implemented 7/1/16
- This is an area of continuous improvement. HR is still identifying efficiencies and refining processes

## Require all schools to use SubFinder in order to better control use of leave

### Completed 2015/16

- All sites went live on Sub Finder 7/1/2015. In 2016, the company was purchased by Frontline and 7/1/2016, AESOP was rolled out to all sites. All certified leave is currently being entered through AESOP and tracked through its interface to Visions.

## Develop strategies to reduce employee absences on Mondays and Fridays

### Not complete by 2016-17

- New HR leadership is reorganizing the department to ensure this is in development in 2017-18.

# Chapter 3 (3/4)

## **Publish an online employee handbook, as well as detailed HR screens on the district's website to handle the top 10 most frequent calls to the HR Department**

### **Not complete by 2016-17**

- New HR leadership is reorganizing the department to ensure this is on target for development in 2017-18.

## **Discontinue printing hard copies of the TUSD benefits handbook**

### **Completed**

- A electronic copy of the benefits handbook was rolled out during open enrollment for the 2016-17 fiscal year and distribution of hard copies of the document discontinued.

## **Improve records processing and maintenance**

### **Completed**

- Implemented iVisions 7/1/2015. All paper processes were transitioned to electronic processes, the majority of employee forms and records were converted to be either electrically submitted or scanned and attached to the employee record.
  - This is an area of continuous improvement. HR is still identifying efficiencies and refining processes

### **Still in process**

- HR is working with Finance to acquire an electronic document storage solution that will further streamline records processing and maintenance

# Chapter 3 (4/4)

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### Still in process

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## The district should use a requirements-based application selection process for identifying and selecting an ERP system and student information system

### Action: Fully Implemented - 100% completed.

The District used requirement based application set when selecting the ERP and Student Information Systems upgrades.

- The District selected Tyler Vision's ERP application which is used by 98% of school districts in Arizona meeting the needs of the district in a cost effective and financially sustainable application which supports application integrations with TimeClocks Plus, Subfinder, Applitrack, Hayes Asset Management cloud based application and the District's account provisioning system.
- The District Student Information System selection was also requirement based on the new requirements and mandates for certifying a SIS with the ADE's AzEds updated infrastructure. The district's Mojave SIS team where members of ADE's committee for selecting ADE's approved SIS EduPoint's Synergy application and preferred vendor.

# Chapter 4

## Technology Management

### **Bring all technology-related staff and resources that are located in other departments into the Technology Services Department**

**Action: Fully Implemented - 100% completed in 2014-15 School Year.**

Only exception is Food Service with their Application and Database Administrator. Food Services receives TS database services and standardized to TS configuration, account provisioning and back up methodologies.

### **Use staffing formulas and service level metrics to determine the number of staff necessary to maintain TUSD's computers and devices**

**Action: Fully Implemented - 100% completed.**

Staffing ratio for TS field support has maintain 37 personnel responsible for providing support services to approximately 36,000 Win7&10 devices plus 5K Apple devices across 89 campuses, Operations, Administration at 1010, Star Center, Food Services and School Safety departments. The District increased the total number of devices from 22K listed in the Gibson 5/14 report and currently supports a ratio of 1:1378; one TS field tech for 1378 devices, still remaining within current best practices. This ratio has more than double since the Gibson Audit in 2014 which reported a devices to tech ratio of 594:1. The District continues to align with field tech to device ratios of neighboring districts such as Mesa.

TS continues to build support capacity to increase the number of devices to field tech ratio preparing for future expansions. TS is re-engineering the District's Windows infrastructure from the ground up, requiring infrastructure upgrades and 36K devices upgraded to the latest optimized Win10 for education operating system. The optimizations is lead by Microsoft's senior Win10 engineers. The District was selected by Microsoft to participate in a leading program known as the "Technology Adoption Program" implementing Microsoft's best practices for supporting Windows devices in the educational K-12 arena. TS is confident they will not require any additional field tech support staff as they move to a 1:1 environment.

# Chapter 4 (2/7)

## Develop a project management methodology using industry standards and implement it throughout the department

**Action: Fully Implemented 100 % completed.**

Technology Services (TS) utilizes Project Management best practices for planning, resource planning, problem escalation and resolution, communication and marketing, Work Breakdown Structures(WBS) and customized Visio task mapping and planning diagrams. TS also utilizes KanBan boards for task management and prioritization of project needs and competing initiatives. TS is migrating to Office Planner to further assist with resource management, increase in communication and collaboration of simultaneous project tasks and activities. TS Change Management process incorporates project plans and follows best practices for software & hardware production releases process from lab, User Acceptance Testing, Production release life cycle and source code management. On larger projects information is captured in a formal process of sponsors, requirements, due dates, resources, priority status and budget. Major project updates are provided to the Governing Board and the public of the current status of the project. TS also has expanded project planning to principals to utilize the custom Visio templates for yearly planning of teaching and assessment reviews.

# Chapter 4 (3/7)

## Update the Technology Services Department job descriptions according to current departmental needs

**Action: Partially implemented - 95% completed.**

Technology Services job descriptions have been updated and aligned to the District's technology needs along with clarification and employee expectations for communication, respectful and professional conduct. HR is in the final stages of review.

## Conduct a feasibility analysis to identify ways to have a data center that is on par with industry standards

**Action: Fully Implemented - 100% completed.**

2014-15 SY the governing board approved as part of the ITIMI project the 1010 data center relocation and upgrade to Involta. The District successfully migrated core and new application server infrastructure to the Involta data center allowing for 24x7 availability of IT systems connected to a robust fiber network for internal connectivity and to the internet. The Involta data center infrastructure allows the District to provision virtual servers providing a "Test/lab" and "User Acceptance testing (UAT)" (zero additional cost) and production server environments. These testing environments were cost prohibitive in the past due to hardware cost. The current server infrastructure in Involta is directly responsible for the higher availability of production systems, with a consistent 99.9% up-time and meeting enterprise and industry standards. Additional benefits of the Involta data center upgrade is in regards to an increase with application testing and staffs overall awareness of production upgrades across the district. Increase in data backup capacity and systems recovery providing an efficient deployment life cycle process while reducing overall risk of a major system outages during small and major upgrades.

# Chapter 4 (4/7)

## Implement the recommendations from the Dell, Inc. IT Simplification Assessment (Pt. 1)

Action: Partially Implemented - Overall 85% completed

Recommendation	Status
1. Develop IT governance with formalized strategic planning and communication -	Partially Implemented 90 % completed – Finalizing access control documentation processes. Enhanced communication distribution email groups for focused – direct communication.
2. Enhance the security environment by mitigating risk	Fully Implemented 100 %Completed – MSFT Premier audits, implement third party automated alerting for network and core system with escalation processing via text, email and phone call media. Upgraded wireless network- Identify Security Engine –ISE start of 1718SY -
3. Develop and implement a disaster recovery plan	Partially Implemented 25% Completed – DR template created in process of updating system by system. Scheduling DR testing for Visions ERP during 2017-18SY.
4. Develop an industry standard service desk	Fully Implemented 100% Completed – standardized documentation and call processes, aligned TrackIT categories across teams for consistent incident ticketing system.



# Chapter 4 (5/7)

## Implement the recommendations from the Dell, Inc. IT Simplification Assessment (Pt. 2)

Action: Partially Implemented - Overall 85% completed

Recommendation	Status
5. Implement a services management framework	Fully Implemented 100% Completed – streamlined incident TrackIT for quicker resolution times, queue monitoring and continuous improvement review to resolve systemic issues. Procurement process updated to include TS analysis for one-time implementation costs and on-going cost of operation for full budgeting. Detailed analysis and decision rubric to ensure all aspect of the proposed application will function properly within the District.
6. Create a service catalog with defined service level agreements	Completed -Service level structure and definition outlined in the DOG and on the TS intranet site. TS is in process of refresh and update the catalog for the 1718SY to reflect new application ad processes.
7. Become Performance driven by implementing comprehensive monitoring and metrics collections	Fully Implemented 100% Completed – quarter review of systems status, network, server, database, application specific work orders, trend analysis, short cost avoidance and impact avoidance to application. Enhanced reporting and dashboard with Orion
8. Enhance the Use of Tools and automation with emphasis on Storage	Fully implemented 100% - monitoring and automated alerting- automated system growth alerting for server and DB - predictive days remaining based on trending data growth and disk space consumption. Role based provision for Synergy and LDAP/ADFS single sign on.

# Chapter 4 (6/7)

## Implement the recommendations from the Dell, Inc. IT Simplification Assessment (Pt. 3)

Action: Partially Implemented - Overall 85% completed

Recommendation	Status
9. Implement employee professional learning plans align with job description	Fully Implemented – 100 % completed. Starting in 2015 all staff have access to training documentation and specialized training seminars through various vendors. A training model was implement 2015-12016 for staff to work side by side with a highly qualified consultant to perform tasks and hands on learning for 8 to 12months. Staff is also encourage professional develop through Microsoft workshops and leading projects with contractors.
10. Become process oriented by enhancing documentation practices	Fully Implemented – 100% completed. Staff for all departments submit detailed Change management request documenting step by step changes, providing evidence of testing, risk analysis, check out processes and rollback process. Development documents code in Team Foundation Server with notes on who has requested change, due date, reason for change and scope. Staff are owners for all production updates even when contractors or consultants are overseeing task. TS documents “How To” for application specific tasks in various media forms of documentation and video.

# Chapter 4 (7/7)

## Implement the recommendations from the Dell, Inc. IT Simplification Assessment (Pt. 4)

Action: Partially Implemented - Overall 85% completed

Recommendation	Status
11. Explore cloud readiness upon completion of the modernization project and enhancing messaging	Fully Implemented 100% complete- Office365 pilot group comprised of TS and approximately 50 teachers finishing up UAT testing. District deployment schedule for the fall of 1718SY for staff and student, fully provisioning with enhanced communication applications from the Office365 suite of applications including Skype for online collaboration and chat, Groups, Teams, PLC groups for enhanced collaboration and reduction of email, Office Planner for project and task management. Email and file storage with data loss protection services in MS Cloud. Data warehouse production operational in Microsoft Azure Cloud services. Utilization of cloud application services for School City, Clarity, Imagine Learning, TrueNorth Logic, My Learning Plan all with automated rostering and single sign on.

# Chapter 5

## Facilities Management

### Reduce number of portable classrooms

- Started with 303 Portable Classrooms and currently have 288
  - 187 are being utilized as classrooms
  - 79 are vacant
  - 12 are located at closed schools
  - 10 are being used for either storage or office space
  - 8 have been auctioned
  - 7 have been demolished
- Mothballed portables tend to be seen as available space to sites and they lobby to put them back into use.
- Depending on size, it costs approximately \$20-\$50,000 to demolish a portable, release utilities, and restore grounds.
- Portables can be auctioned, but there is little demand, and the cost to move them can be more expensive than demolition
  - In 2015, three portables were moved for a total cost of \$245,500

### Continue to evaluate school capacities and consider further school consolidation

- Capacities are evaluated annually
- Our created Database of all classrooms includes size and designed function
  - Will convert to MSAccess to reduce data entry
- Developed a system to use room-use information to calculate capacities.
- Cross-referenced all room numbers with floor plans and central information.
- No further consolidations have been considered.

# Chapter 5 (2/8)

## **Continue to implement warehouse process improvements and overhaul the facilities purchasing process**

- With the implementation of FAMIS in February 2016, our new CMMS system, we can accurately track inventory, assets, and cost per work order.
- Coinciding with this new system, all purchasing processes were reviewed, revised, and documented.
- Currently working to implement an Inventory Management System through Grainer, at no cost to the District, to consolidate the number of vendors utilized.

## **Enhance existing facility condition assessment process through the incorporation of best practice procedures**

- Facilities Condition Index (FCI) is monitored and updated on a continual basis.
  - The FCI was enhanced to support the Unitary Status Plan
- A Multi-Year Facilities Plan, based on the FCI, allows the District to Prioritize repairs/replacements (also USP).
- Implemented VFA computerized assessment system in January 2016 which allows us to estimate costs
  - Assigned two project managers for a 8 month period to complete VFA site assessments
  - Completed assessment of evaluation of mechanical systems to prepare for the Facility Master Plan and Bond Offering
  - Validated cost of repairs with 3rd party vendors for use as a basis for facility maintenance in the bond. Endorsed by FMG, Inc.

# Chapter 5 (3/8)

## Utilize A/E project managers for contract management, quality assurance/quality control, FCI, support of technology projects, fire and life safety inspections

- A/E Project Managers:
  - Provide oversight for Contracted Services
  - Work with Facilities Shops to ensure contracted work meets District standards
  - Oversee Fire Safety Projects
  - Maintains the FCI, including on-going inspections and documentation/ justification for adjustments
  - Improve SFB projects and their application process (Grants)
- Technology Services has their own Project Managers and do not utilize A/E Project Managers

## Develop TUSD Operations Division strategic facilities plan

- Facilities Master Plan completed in 2016 and addresses:
  - Optimization of performance of existing schools by identifying necessary system replacements/repairs and their costs
  - Defines how a value is created to our stakeholders through repairs to improve learning environments
  - Utilized for recommendations to respond to external opportunities and threats
- Operations Organization Plan initiated to address internal factors:
  - Workshops held with staff regarding Customer Service, Preventative Maintenance, Efficiency and Effectiveness, and Project Management
    - Included discussions on strengths, weaknesses, opportunities, and threats to address, primarily, the internal factors identified by Gibson including the talent pool, organizational culture, and the availability of resources.

# Chapter 5 (4/8)

## Document facilities management policies, procedures and workflow processes

- Facilities FAMIS work order team to address work processes and system implementation.
  - Facilities customer service team (customer service representative), conducts monthly site visits at each school and reviews work orders and issues, and acts as the facilities liaison for school sites.
  - Classification of work orders and site training on entering work orders: emergency, high, normal and scheduled response times.
  - Processes and Procedures are being documented on a SharePoint accessible to facilities personnel. Work Order process has automated email updates, and is available to sites for review via web-based system 24/7

## Implement and integrate new CMMS to improve efficiencies and provide facilities data for better decision making

- Implemented FAMIS –CMMS system February 2016.
- Trained facilities staff and school sites in FAMIS operation.
- Created a link to FAMIS on TUSD homepage for entering work orders into the system.
- FAMIS training classes on a scheduled basis for facilities and school personnel.
- FAMIS provides information to both the school site and facilities.
- FAMIS system team meets bimonthly to address work processes and continued system operation.

# Chapter 5 (5/8)

## Improve preventive maintenance program

- Created preventative maintenance program that mirrors School Facilities Board requirements.
- Customer service team utilized to convey preventative maintenance response schedules.
- A dedicated (permanent) PM team was created rather than relying on temporary assistance from shops.
- High school Engineers participate in school site preventative maintenance tech processes and training.

## Enhance operations and maintenance training program

- Facilities safety team created to address safety issues and training requirements.
- Annual safety training for facilities staff coordinated with risk management/trust:
  - Heat stress, lifting, ladder safety, blood borne pathogens, lock out/tag out.
- Equipment certification training.
  - Bucket truck, fork lift, scissor lift, boom lift.
- FAMIS training classes on a scheduled basis for facilities and school personnel.

## Formalize and improve operations and maintenance performance measurement

- Preventative Maintenance schedules maintained through work orders in FAMIS.
- Preventative Maintenance work tied to equipment assets in FAMIS to show history of when equipment is serviced.
- Year-to-Year comparisons can now be made as needed.



# Chapter 5 (6/8)

## Repair/replace outdated equipment

- Since 2014, as capital is allocated, the following equipment has been purchased utilizing approximately \$400,000:
  - Mower
  - Bucket Truck
  - Scissor Lift
  - Boom Lift
  - Backhoe
  - Trailers
  - Other Small Capital Equipment

## Implement more centralized management approach to custodial services

- Leadership decided to continue to have school administration supervise the custodians.
  - Budgetary
  - Administrators are onsite 12 months for supervision now

## Invest in updated cleaning equipment to improve efficiency through reduced work demands

Since 2014, as capital is available, cleaning equipment has been purchased utilizing approximately \$125,000.

# Chapter 5 (7/8)

## Increase custodial staffing after management change and equipment investments

- Eleven Utility Custodian Positions were added in FY15/16 to assist sites with absences such as FMLA, LOA, Sick, Vacation.
- District still continues to use 2012 FTE formulas (fewer) for determining site numbers of custodians. This is because of budgetary constraints and direction from Finance.

## Implement energy management plan

ESCO Project – Guaranteed Energy Savings

Funding Authorization:	Guaranteed Energy Savings Contract per A.R.S. 2013-20
Project Description:	Energy Conservations measures include lighting retrofit, fire and security auxiliary monitoring, master meter auxiliary monitoring, comprehensive campus EMCS upgrade, and water leak repair.
Total Number of Facilities:	32 Schools and 4 Support Sites
Baseline Annual Energy Cost:	\$7,189,022
Baseline Annual Energy Consumption:	62,725,211
Total Project Cost:	\$28,713,537
Guaranteed Annual Savings (Units):	7,786,355
Guaranteed Annual Savings (Dollars):	\$1,642,549
Name of Qualified Provider:	Ameresco, Climatec, Honeywell, and MidState

# Chapter 5 (8/8)

## Implement energy management plan (Pt. 2)

ESCO Project – Guaranteed Energy Savings

	Phase 1	Phase 2	Phase 3 Proposed (Estimated \$ Savings)
<b># of Sites</b>	43	5	42
<b>Solar Production Usage (kWh)</b>	20,010,704	2,379,169	22,330,819
<b>Solar Production Cost Savings</b>	\$278,148.79	\$69,204.91	\$500,000.00

## Efficiencies have made a difference

### Estimated Portable Building Shuttering Energy Savings

If average from above \$/SqFt equals \$1.57, then an estimated \$1,416 would be saved annually for each 900 Sq Ft portable building shuttered. For example, 50 portable buildings shuttered completely would equate to \$70,800 annual energy savings.

<b>\$/SqFt Reduction (Comparison)</b>	<b>FY 08-12 \$/SqFt Average</b>	<b>FY 16 \$/SqFt</b>
<b>Elementary School</b>	\$2.13	\$1.63
<b>Middle School</b>	\$2.14	\$1.70
<b>K-8 School</b>	\$1.78	\$1.57
<b>High School</b>	\$1.80	\$1.37

# Chapter 6

## Transportation Management

### Reduce the number of monitors for non-IEP routes

- Bus Monitors are assigned to routes as required by I.E.P
- 133 Total BM, 127 assigned to 258 runs with I.E.P's
- Remaining Bus Monitors are assigned to routes as follows:
  - Assist Pre-K and other young riders with safety harnesses & supervision
  - Supervise students with emotional/behavior issues
  - Near or at-capacity routes for safety & student behavior management
  - Assist at transfer points by providing supervision, information, and responding to incidents & accidents

### Eliminate position classification for router and increase the number of router/analysts

- Two Route Tech positions have been converted to Route Analyst
- One scheduled for conversion August 2017
- Remaining four (4) Route Tech positions will be converted through attrition within 24 months, or as they are vacated
- Total Cost +\$42,672

# Chapter 6 (2/3)

## **Implement state of the art routing and scheduling software to optimize routing efficiency.**

### **Schedule transportation for students who intend to ride the school bus**

- Contracted TransPar Consulting Group to provide training assistance
- VersaTran routing system implementation on schedule 8/2017
- Transportation staff trained & currently utilizing system
- 16,000 TUSD students routed for SY2017-18
- TripTracker module full implementation scheduled for 2018

## **Renegotiate labor agreement to pay drivers and monitors for actual time worked**

- Current MOU language guarantees 30 hours minimum pay regardless of the amount of time worked under 30 hours.
  - This was an improvement from the higher 40 hours.
- Transportation proposed recommendations requiring drivers and monitors stay on-the-clock and on the premises to perform other work.
  - Under the proposal drivers and monitors would be paid for time worked only, if other work assignments are not accepted
  - This would have to be approved language in MOU

## **Reduce budgeted staff for mechanics from 21 to 19**

Mechanics have been reduced from 21 to 19

# Chapter 6 (3/3)

## **Adopt a policy to perform a preventive maintenance inspection for every school bus every 4,000 miles or not less than once every 90 days**

- Buses are now inspected once every 90 days
  - This procedure was adopted SY16-17
- Since SY16-17 approximately 460 inspections were performed

## **Conduct preventive maintenance inspections on a second shift at the Central facility**

Preventive Maintenance Inspections are performed on all shifts at all three facilities: Central, East, and West

## **Budget funds to replace school buses each year and continue to buy medium-duty buses to replace larger buses**

- Leases (loans) are being renewed as they expire
- Three 5-year leases have been renewed to date
- There are currently 75 buses on recent leases (lease to own)
- Medium sized buses have been procured to address student load needs

# Chapter 7

## Food Services

### Allocate additional indirect costs of the food services operations to the food services fund

Indirect Cash Transfer from Food Services to M&O

- SY 13-14: \$500,000
- SY 14-15: \$625,000
- SY 15-16: \$750,000
- SY 16-17: \$875,000
- SY 17-18: \$1,000,000

### Eliminate vacant positions in the Food Service central office

Food Services ramps up and down with central support and site operations staff based on participation levels, program coordination needs and operation system designs. Each year we review labor and staff accordingly based on levels of coverage needed for each area.

Due to efficiency steps taken within the department over this timeframe, we have reduced our overall positions from 482 to 300 (- 38%).

This includes a decrease in Central Support positions (-31%) and Site Operation positions (-38%).

#### Temp Services

In addition to saving in direct labor – we have reduced our contract service budget for SY 17/18 by (- \$ 450,000) or 75%

# Chapter 7 (2/5)

## Eliminate vacant positions in the Food Service central office (Pt. 2)

### Position decreases were the result of the following factors:

- Levels of enrollment
- Levels of overall Participation
- Streamline of menu options
- Streamline of service design
- Streamline of product diversity
- “System Steps” review and reduction in processes
- Updated technology / Integrated Food Service system
- Updated technology / On-line applications / Meal accounts
- Distribution–redesign of delivery routes

### Annual Fiscal Impact over the SY 14/15-SY 16/17 timeframe

**Labor: -\$287,712**

## Implement steps to increase meal participation at schools

SY 14/15-SY 16/17 Timeframe

### Average Daily Participation (ADP):

Breakfast Meals Served:	8,671
Lunch Meals Served:	28,420
Snacks Served:	2,839

Average Annual Summer Meals Served:	193,434
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Average Annual Supper Meals Served:	25,741
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# Chapter 7 (3/5)

## Implement steps to increase meal participation at schools (Pt. 2)

- Decrease in Enrollment
- Decrease in Free & Reduced Eligible Students
- Increase in Paid Meal Price
- Service time less than 30 minutes (avg loss up to 25%)
- One Lunch Meal Periods (Middle & High School / avg loss 15%)
- Bell Schedule not in sync with Bus Schedule (*Breakfast*)
- Product Availability Issues (i.e. Pizza/Burgers & commodity items)
- Vacant Positions
- Negative Meal Accounts
- Lack of Monitors in the Lunchroom
- Competitive Food Sales During Meal Period
- Food Brought on to Campus for Student Lunch
- Slow Service / Meal Quality / Customer Service
- Students without ID or Different Name in Synergy
- Balancing Activities offered during the Lunch Period and Time to Eat Lunch
- No Meal Application

# Chapter 7 (4/5)

## Implement steps to increase meal participation at schools (Pt. 3)

### New Service Stations

- **Fusion:** Dishes from around the world
- **Stadium:** Fun Fit Food
- **Craves:** Favorites /Homestyle
- **Go-Line**
- **Pizzeria/Deli Combo**
- **Cyber Café**
- **Breakfast Carts**

### Student Activities

- Healthier US Challenge Awards & Event
- International Culinary Showcase
- Artesian Bakery Line (smart snack compliant / supporting celebrations in the classroom)
- Nutrition Education
- Food Literacy
- School Garden Network
- Culinary Classes
- Southern Arizona Farm Network
- Student Wellness Programs
- Merchant's Garden
- TUSD GROWS Field Trip Station
- Supper Program

Food Services Awarded Grants & Donations/ Student Activities:

**SY 14/15:** \$338,512

**SY 15/16:** \$407,099

**SY 16/17:** \$658,180

**SY 17/18:** \$307,179 (to date)

***Impact is both tangible and intangible with customer participation, wellness and the education of food and nutrition.***

# Chapter 7 (5/5)

## Implement steps to increase meal participation at schools (Pt. 4)

### **Categorical reports submitted periodically to CFO regarding:**

- F&R Levels & Forecast Trends
- Budget / Rev/Exp to include upcoming claim
- Program Development & Event Activity / Customer Surveys
- Child Nutrition & School Food Service Industry Legislation Updates
- Labor shifts in hours/contract months or positions (reviewed twice a year)
- New Design Changes in : Menu, Service, or Distribution Design
- Annual Goals / Projects

# Chapter 8

## Other Recommendations

### Re-engineer school processes to reduce clerical staff work demands

TBD

### Move badging to the School Safety Department

This will be accomplished during the 2017-18 school year.

### Transition to electronic fingerprinting and relocate all fingerprinting to the School Safety Department

This will be implemented during the 2017-18 school year.

### Require all campus monitors and site security guards to complete annual training with the School Safety Department

2014-2015: All K-8, Middle and High School Monitors received eight-hour basic training.

2015-2016: All Elementary Monitors received eight-hour basic. High School, Middle, and K-8 Schools received four hours continuing training.

2016-2017: All new Monitors received a four-hour basic training.

2017-2018: Four-hour new Monitor training will be continued along with all Monitor continuing training.

**Monitor training topics:** Incident response, report writing, search and seizure, use of force, de-escalation skills, radio procedures, drug awareness, emergency procedures, mandatory reporting