

Action Plan for Operations

School District of Philadelphia Operations Division

Two Year Action Plan

2014 -2016

Goals, Strategies and Actions Operations Supplement: Getting to Great

MISSION AND VISION

Our Vision

We are going to make our schools great again. We will deliver on the right of every child in Philadelphia to an excellent public school education in a safe, healthy and welcoming facility. We will raise the standard for school facilities and ensure that every school is well maintained, clean and in good repair. We will provide all students and teachers with environments that are conducive to learning. We want children and teachers to look forward to working and learning in our buildings, eating at our cafeterias and traveling safely to and from school. The physical environment, food quality and transportation services at all of our schools will become a beacon of pride and best in class for the children, teachers and administrators in our schools.

Our Mission

Our mission is to provide safe, comfortable, welcoming and healthy school facilities that support teaching and learning opportunities and improve academic outcomes for our students. We will provide nutritious food offerings and safe and effective transportation to stimulate and support learning. We will procure high quality goods and services at competitive prices. We will provide exceptional customer service to the students, faculty, administrators, district colleagues and the school community who are our customers.

The Values That Drive Our Work

- We will provide safe, high quality physical environments, food and transportation services that contribute to 100% of students graduating ready for college and career as our core service.
- We are trusted stewards of public resources. We operate in a manner that ensures fiscal and financial stability where all expenditure decisions – no matter how large or small – are aligned with and help to advance the District’s strategic priorities.
- We are customer driven and will focus our improvements by listening to our customers.
- We will carry ourselves and carry out our work with honesty, integrity and high ethical standards.
- We will hold ourselves and those that work with us accountable.
- We will be results driven and achieve the goals we set for ourselves.
- We will create a workplace where employees feel appreciated and understand their contribution to supporting education.
- We will create a sense of ownership and pride over the services we deliver.

Anchor Goals

Anchor Goal 1 For District: 100% of students will graduate, ready for college and career.

- **Anchor Goal 1 For Operations Division:** The SDP Operations Division will provide 100% of students with a learning environment that is safe, healthy, and welcoming.

Anchor Goal 2 for District: 100% of 8-year-olds will read on grade level.

Anchor Goal 2 for Operations Division: The SDP Operations Division will ensure the physical environment at elementary schools is safe, healthy, welcoming and conducive to learning. We will promote successful classroom designs that contribute to student performance. We will improve student health and learning outcomes by providing nutritious and appealing meals in a safe and pleasant environment. We will provide students with a timely ride to school that lasts less than an hour.

Anchor Goal 3 for District: 100% of schools will have great principals and teachers.

- **Anchor Goal 3 for Operations Division:** The SDP Operations Division will fill all parts of our division with high-performing talent who are committed to and capable of delivering on our goals to dramatically improve student outcomes, achieve operational goals and ensure financial stability.

Anchor Goal 4 For District: SDP will have 100% of the funding we need for great schools, and zero deficit.

- **Anchor Goal 4 For Operations Division:** The SDP Operations Division will provide services cost-effectively and efficiently and deliver the highest quality products, services and resources. We will seek out new resources wherever possible and operate within budget.

Definition of a Strategy: *A District priority around which District work is organized. Collectively the strategies identify all of our priority work. Strategies directly contribute to the four Anchor Goals.*

Definition of an Action: *Directly and significantly contributes to the achievement of a strategy, describe something specific and measurable. The case for actions can be made using evidence and data. An action is big enough to require an initiative owner to shepherd and shape its implementation. An action is important enough for SDP senior leaders to actively engage on a monthly or quarterly timeframe.*

Operations-Wide Strategies to Achieve Anchor Goals

STRATEGY 1: IMPROVE STUDENT LEARNING: We will ensure that all students achieve their maximum potential in the classroom and beyond by employing evidence-based, tailored interventions in support of their academic, social-emotional, and physical well-being.

- Repair and maintain facilities to create an optimal learning environment
- Improve the quality and lower the cost of transportation services
- Improve the quality and nutritional value of food served to students
- Create, track and display the Division's Key Performance Measures

STRATEGY 2: DEVELOP SYSTEM OF EXCELLENT SCHOOLS: We will strengthen our system of schools so that all students have access to equitable, excellent and safe schools, valued by the public.

- Repair and maintain facilities to provide a clean and comfortable building environment in all schools
 - Perform facility condition assessment
 - Develop real property and space management plan
 - Produce periodic input towards performance management efforts
 - Establish standards and partnerships towards Indoor Environmental Air Quality (IEQ) reviews
 - Expand program assessment and evaluation efforts, with real time reporting
- Align facility related decisions with educational goals and based on the students well-being and instructional setting
- Continuously support and execute actions of the system-of-schools plan
- Generate relevant metrics to permit and support data driven decisions

STRATEGY 3: IDENTIFY AND DEVELOP EXCEPTIONAL, COMMITTED PEOPLE: We will fill all parts of our organization with high-performing talent who are committed to and capable of delivering on our goals to dramatically improve student outcomes and ensure financial stability

- Improve recruitment and hiring practices to attract the highest quality candidates
- Celebrate, retain, support and promote high performing staff
- Create and regularly update Operations personnel database to include title, school assignment, relevant skills and overtime data for each employee
- Clearly define roles and responsibilities for each member of the Operations Division. Revise job descriptions so that they contain the skills, abilities, duties and responsibilities required to ensure the Division has a qualified staff
- Set clear expectations for staff and implement regular performance evaluations
- Upgrade Biometric Time and Attendance System in order to track personnel hours and overtime district-wide
- Refine performance goals, measures, and targets of staff, managers, and divisions
- Ensure staff capabilities can meet performance goals, and provide on-going trainings to attain the needed skills sets, where identified
- Promote greater diversification and professionalization of workforce
- Establish more effective relationships within the organization, and outside of each division
- Engage teachers, principals, professional networks, labor unions and other partners to help with assessments to identify, explore, develop and scale great ideas related to talent
- Support the continuous improvement of all personnel. Perform a training needs assessment and develop an annual training plan to improve the overall efficiency of Operations Division staff
 - Implement Leadership and Technical Training Program

- Devise New Employee Orientation Program
- Communicate career opportunities
- Develop Succession Plan
- Evaluate the current staffing model and productivity standards for each division and define improvements that can be made to improve efficiency and optimize results
- Institute Performance Management Processes: Measure employee performance in achieving objective acceptable standards for each service provided and for each facility's functional performance, safety, sanitation, physical condition and appearance

STRATEGY 4: BECOME A PARENT AND FAMILY-CENTERED ORGANIZATION: We will listen to and respect students, parents and families to inform decisions and we will improve external communication.

- Work through and with the Office of Family and Parent Engagement to actively reach out to parents to involve them in their children's schools
- Establish clear processes for parent and family input and ideas and encourage parents and families to report maintenance issues
- Provide parents and families with excellent customer service
- Provide parents and families with ample information on their schools including information about planned capital projects and the criteria for setting capital funding priorities
- Make school facility-related decisions with the input of our customers that reflect educationally sound, life safety based and fiscally responsible criteria
- Provide all staff with professional development focused on their obligation to ensure that families and other visitors experience safety, comfort, friendliness and respect within all school district facilities.

STRATEGY 5: BECOME AN INNOVATIVE AND ACCOUNTABLE ORGANIZATION: We will align our full organization – from our infrastructure to the mindset of each employee –to our goals and hold ourselves accountable for delivering on our commitments to the students of Philadelphia. We will approach our work with curiosity, fresh perspective and encourage new ideas and approaches.

- Cultivate and sustain partnerships at the system and school levels
- Transform the organization by instituting strategic management processes at all levels and building a culture of excellence
- Implement effective, aligned business processes standardized across SDP
- Improve data accuracy, application and accessibility. Base operations, capital improvement and maintenance plans on a foundation of high quality data about all school facilities
- Improve communication throughout the organization and to the public
- Actively promote innovation and cross-functional design thinking
- Update the organization structure to shift Capital Programs and Office of Environmental Management and Services under Facilities
- Improve customer service and implement annual customer survey

STRATEGY 6: ACHIEVE AND SUSTAIN FINANCIAL BALANCE: We will achieve and maintain balanced operating, capital and grants budgets, and enlist all Operations employees as responsible stewards of our public resources.

- Build a budget from zero base, analyzing every function within the Operations Division for its needs and costs
- Optimize investment in SDP facilities and infrastructure to help SDP to achieve their educational mission

- Seek additional revenues and institute financial controls
- Meet the immediate financial challenges of FY14 and FY15
- Continuously analyze the impact of spending and deploying resources to achieve priorities, and to the activities, schools and programs that need them most
- Align the capital and grants programs in support of the anchor and academic goals
- Integrate performance management into budgetary processes for all operations
- Build internal consensus with staff, and meaningful external Scopes of Work with partners and vendors for efficient program delivery, targets, projected and needed measures, and data usage

Strategies and actions specific to four major divisions: facilities and capital programs food services, transportation, and procurement

FACILITIES AND CAPITAL PROGRAM

Description of Facilities and Capital Program Division

The Office of Facilities Management and Operations provides essential services, critical responses, and mandated standards for the proper functioning of School District of Philadelphia buildings. It is imperative, in this responsibility, for the office to establish operational integrity and continuity through Strategic Objectives that serve the District overall, and serve each site with quality supports and effective management.

SDP manages an in-house facilities services workforce that provides custodial, maintenance and grounds services across the majority of its 214 schools and X number of buildings. SDP's portfolio represents more than 29 million square feet of facilities, in addition to many fields and other acreage that requires landscaping, snowplowing, and other grounds-related services.

SDP's central office management team of approximately 60 individuals oversees a workforce of more than 1,350 full-time employees and an annual budget of approximately \$186 million in FY14 to manage 21.5 million square feet of cleanable space within School District properties. The scope of central management responsibilities includes custodial staffing, scheduling and planning work orders, identifying and tracking key performance indicators, performing building audits and quality inspections, and finance and planning for all of facilities services (including additional functions such as print shop, mail services, utilities, warehouse/moving, and real estate).

The Office of Capital Programs is responsible for identifying and prioritizing capital work within the School District of Philadelphia. This includes maintaining the physical integrity of existing facilities, constructing new buildings, and renovating existing facilities to accommodate the educational needs of the District. The capital budget is funded through the sale of bonds usually repayable with interest over 30 years. In order for a project to be eligible for capital funds, it must have a useful life of 5 years or more. The annual capital budget for FY2013-14 is \$134.3 million. This budget is the basis for the multiyear Capital Improvement Program (CIP). Projects are selected for inclusion in the CIP using building condition assessment reports, work order data, field maintenance employee input and the Superintendent's educational priorities. The majority of capital investments replace critical life cycle systems such as replacement boilers and chillers, roofs and windows as well as electrical system upgrades.

Goal for Facilities and Capital Programs

Achieve a state of good repair across the SDP's portfolio of facilities to provide a clean, safe and welcoming learning environment for students, teachers and community members.

Performance Goals:

- Improve Facility Condition Assessment by XXXX
- Reduce Energy Costs by YYY
- Improve Customer Satisfaction Levels by ZZZ
- Ensure that 95% of the capital projects advertised, bid and awarded are completed on time

Key Performance Indicators:

- Custodial Workload
- Custodial Staffing per Building
- Maintenance Cost per Square Foot
- Work Order Completion Time
- Utility Usage per Square Foot
- Water Usage per Square Foot

Strategies and Actions for Facilities and Capital Programs

STRATEGY 1: WE WILL MAKE CAPITAL INVESTMENTS BASED UPON OBJECTIVE, CONSISTENT AND EQUITABLE CRITERIA AND A RIGOROUS TRANSPARENT PROCESS. Given SDP's sizable deferred maintenance needs, in order to make equitable decisions across the district that are in the best interest of our children, it is imperative that we prioritize our investments.

- Align capital program with anchor goals and strategies of the District, as well as this Action Plan
- Make capital investments in a strategic, proactive, transparent manner.
- Clearly define project eligibility for capital investments (i.e. five year useful life)
- Consolidate similar investments into a single RFP to obtain best possible price
- Establish a written rating and ranking process to evaluate capital budget and program requests against multiple factors (e.g., health and safety requirements, potential for adverse consequences, life-cycle costs, return on investment, contracts commitments, potential for interruption of service delivery, consistency with approved Facilities Master Plan, alignment of academic program, promotion or acceleration of economic development)
 - Use return on investment analysis to understand the impact capital investment has on operations and maintenance (e.g., service impacts, and cost of alternative options)
 - Prepare an analysis of capital spending according to purpose (e.g., deferred maintenance, capital reserve, and new asset) to understand spending patterns
 - Consult with facilities to explore how capital investments can be chosen that lower long term maintenance costs
 - Work with building engineers to ensure they have all necessary information and skills needed to maintain the system as part of close-out activities. Create a procedure to ensure this information is passed on to future building engineers for that building
- Create and track key performance indicators
- Develop operational procedure for RFQ and RFP processes
- Enter all data from the building assessment plan into the Computerized Maintenance Management System (CMMS)
- Add updated information to the Computerized Maintenance Management System (CMMS) for each capital investment within 10 days of the approved investment to ensure all information about building condition is contained within a single database
- Remain current on school closing decisions to ensure major investments are not made in these facilities
- Establish a Capital Investments Committee that meets quarterly to review capital planning and investment projects

- Assess condition and capital investment needs of all buildings to prioritize limited capital dollars
- Institute web based program to allow teachers, facility staff and principals to request capital improvements

STRATEGY 2: WE WILL ENSURE THE HEALTH OF STUDENTS, TEACHERS, STAFF AND THE SCHOOL COMMUNITY THROUGH THE IMPLEMENTATION OF ACTION PLANS THAT ANTICIPATE, RECOGNIZE, CONTROL AND PREVENT ENVIRONMENTAL HEALTH HAZARDS IN SCHOOLS.

- Operate district facilities so they are healthy for our students, teachers and staff
 - Correct 100% of mold findings identified through a proactive mold and dampness assessments utilizing the NIOSH DMAT method in student-teacher occupied areas
 - Correct 100% of asthma triggers identified through a proactive Indoor Environmental Quality assessments by geographic cluster using the EPA’s Tools for Schools approach
 - Implement 80% of IEQ corrective actions using the IEQ Dashboard Committee as a mechanism for execution of plans
- Perform infrared roof inspections to identify issues before leaks and potential for mold and dampness enter a facility
- Continue to work with partners to green school properties to create improved recreational spaces and manage stormwater

STRATEGY 3: WE WILL CREATE A SYSTEMATIC AND COORDINATED CENTRALIZED DATA TRACKING SYSTEM FOR FACILITIES MANAGEMENT THAT PROVIDES FOR THE OPTIMAL ALLOCATION OF FUNDING FOR THE MAINTENANCE, REPAIR AND INVESTMENT IN SDP FACILITIES. The uniform collection of this comprehensive data will allow the SDP to make informed facility decisions including prioritizing key facility maintenance projects.

- Establish and track key performance indicators for Facilities Department to include various indicators of building condition and cleanliness (for example, ratio of work orders completed to work orders created, and custodial workload and costs per square foot)
- Implement the Computerized Maintenance Management System (CMMS) to create a single shared system to manage work requests as efficiently as possible and meet the basic information needs of the district
 - CMMS will record work orders for facility repairs, track future repair needs and store a common set of measurable data on the entire portfolio of facilities including square footage, age of systems, expected useful life of systems, use, occupancy and repair history
 - Using CMMS, we will establish work order priorities with anticipated work and response times for better resource allocation and clearer procedures
 - Using CMMS, we also will encourage requesting school to track work order progress through completion, provide feedback on the quality and timeliness of the work and provide regular updates.
 - The CMMS work order system will incorporate preventative maintenance work orders and capture labor and parts costs on both a per-task and per-building basis. The data will also allow the school district to evaluate the useful life of facilities and building components such as heating and cooling, roofs,

environmental and electrical systems and to calculate return on investment (ROI) of repair vs replacement decisions

- Explore feasibility of establishing a call center similar to a school district only 311 system where all work requests go to a single location and work orders are prioritized for maintenance team and building engineers based on complaints received
- Install GPS on all facilities vehicles to allow nearest professional to be assigned to work order/emergency request

STRATEGY 4: WE WILL REHABILITATE FACILITIES, IMPROVING THE PHYSICAL AND ENVIRONMENTAL CONDITION OF BUILDINGS TO CREATE WELCOMING AND INVITING SPACES.

- Develop an annual plan that achieves a fresh, clean and well lit environment for students
- Update and refine facilities master plan
- Develop operating manual that includes expectations for each job title and details preferred practices. Regularly update manual to ensure comprehensive up-to-date information source for all facilities personnel
- Increase staff training opportunities in order to professionalize staff and ensure that each staff member has the knowledge and skills needed to effectively perform their job
- Develop and prioritize personnel and talent strategies that create lasting impact on student achievement
- Promote greater diversification and professionalization of workforce
- Perform Facility Condition Assessment utilizing a third party. Assessment based upon a uniform checklist of the key components of a clean, safe and welcoming school and review and submit that checklist every six months for every facility
- Execute preventive maintenance plan that provides regularly scheduled reviews and repairs of all facilities while considering the surveys from principals, students and parents
- Procure necessary equipment and stabilize all structural repairs
- Perform third party audit of building cleanliness
- Prioritize building and capital investment priorities for each building for each subsequent year by March of the prior year – begin process in July of prior year
- Implement recycling in schools
- Conduct building energy performance contracting
- Develop energy procurement policy and procedures
- Involve our customers in preventing damage to facility condition from vandalism or lack of preventative maintenance

STRATEGY 5: WE WILL CONTINUOUSLY DEVELOP AND IMPLEMENT THE SYSTEM OF SCHOOLS IN ORDER TO OPTIMIZE DISTRICT-WIDE SPACE UTILIZATION FOR BETTER SERVICE DELIVERY

- Develop real property and space management plan and organization
- Perform boundary/catchment optimization
- Support new schools and expansions
- Provide data on utilization and enrollment. Evaluate and track space utilization in school district facilities to capture personnel and student moves. Assess after-school and community use to ensure most effective use of space
- Execute Adaptive Sale and Reuse Policy

STRATEGY 6: WE WILL UNITE THE INITIATIVES THAT ALREADY EXIST WITHIN ALL DEPARTMENTS, AND INTEGRATE ENERGY, RESOURCE EFFICIENCY AND OTHER SUSTAINABILITY PRACTICES INTO DISTRICT OPERATIONS

- Develop and implement a District-wide sustainability management plan that addresses environmental pollutant source reduction, fiscal savings and social responsibilities
- Benchmark energy, water and waste sources at all schools so that all schools receive a baseline level that can be improved upon annually
- Develop emission source reduction goals and strategies including reducing solid wastes, conserving water and electricity, and reducing fleet fuel consumption
- Partner with private industry, non-profit organizations and governmental agencies to find financial support for designing and developing green spaces on our school properties
- Nurture a culture of sustainability in schools through student curriculum enhancement by recognizing the sustainability-related themes and opportunities that already exist in current curriculum and expanding upon same
- Establish Employee-focused Voluntary Sustainability Training using a “Green Team” structure
- Develop and implement a comprehensive set of sustainable design guidelines for both existing buildings and new construction that reflect our District’s culture and commitment to academic excellence and social responsibility while reducing life cycle costs in building operation and maintenance
- Define sustainable purchase and procurement guidelines and identify specific goals

FOOD SERVICES

Description of the Division of Food Services

The Division of Food Services serves approximately twenty-eight million meals per year to 149,000 students. Food Services receives no SDP financial support with 98% of funds provided through federal and state meal reimbursements. 29% of SDP schools are equipped with full service kitchens that allow SDP workers to prepare meals on site. Full service kitchens prepare and serve approximately 30,000 lunches and 20,000 breakfasts each day (serving 41% of students). Approximately 170 district locations and 20 charter schools have a satellite kitchen (serving 59% of students). Satellite kitchens serve approximately 62,000 lunches and 44,000 breakfasts each day through a pre-plated meal prepared by a third party vendor and delivered to schools for SDP workers to heat and serve.

Goal for the Division of Food Services

Improve student health and learning outcomes by providing nutritious, appealing and cost-effective meals served in a safe and pleasant cafeteria.

Performance Goals:

- Increase breakfast participation to 75% of lunch participation in 2014
- Increase full service delivery to 70% of students by 2017-18 school year

Key Performance Indicators:

- Participation Rate broken out by breakfast, lunch and twilight dining and child age and percentage change year over year
- Meal volume (breakfast, lunch, twilight, summer)
- ServSafe or Equivalent certified staff per site
- Total costs per revenue
- Per meal labor expense
- Per meal total expense
- Per meal total revenue
- Equipment costs per revenue
- Free versus reduced lunch
- Full price participation
- Meets SMI Nutrient Standards
- Customer satisfaction and survey results
- Number of service days

Strategies and Actions for the Division of Food Services

STRATEGY 1: WE WILL ACCELERATE OUR TRANSITION TO FULL-SERVICE KITCHENS AND INCREASE STUDENTS SERVED BY FULL SERVICE MEAL DELIVERY TO 70% OF PARTICIPATING STUDENTS BY 2017-18 SCHOOL YEAR.

- Continue to expand full service meal delivery by 15-20 schools per year in existing school buildings that can physically and structurally accommodate a full service kitchen
- Improve healthy food options such as fresh fruit and vegetables, and increase student consumption through expanded menu options while retaining PDE/USDA 'best practices' designation

- Expand staff training with industry leaders and volunteer professional chefs on how to prepare healthier school lunches including use of whole grains within the allotted budget

STRATEGY 2: WE WILL IMPROVE THE QUALITY, VARIETY AND CUSTOMER APPEAL OF PRE-PLATE MEALS TO INCREASE CONSUMPTION AND REDUCE WASTE

- Update specifications for pre-plate meal RFP
 - Improve nutritional quality and offerings of meal
 - Improve the presentation of the meal, appeal and quality
 - Use taste testing as part of bid evaluation process
 - Provide for vendor penalties for failure to meet promised quality standards
 - Include two to four in-service trainings by vendor to SDP food service staff to instruct how to prepare and serve the meals and allow for staff and vendor interaction
 - Require daily bacteriological testing from an independent laboratory
 - Require vendor to label all products with dates based on existing U.S. Calendar, not a Julian Calendar showing day numbers 1-365 for easier identification of product freshness
- Replace menu items that are not selected by students consistently at high levels
- Solicit student feedback via surveys, focus groups and taste tests. Solicit feedback from parents, teachers and principals
- Plan menus with input from students and include local, cultural, and ethnic favorites of the students
 - Include biannual taste testing events for new items that includes students and stakeholders and incorporate those that score well into the menu
- Ensure emergency shelf-stable meals served three to four times a year are appealing and of high quality
 - Explore uses for unused shelf-stable meals prior to expiration other than serving them for school lunch
- Continue implementation of S. R. Watkins study recommendations

STRATEGY 3: WE WILL MEET OR EXCEED ALL USDA REQUIREMENTS

- Implement USDA nutritional lunch and breakfast pattern changes (2013-2014)
- Explore move from Universal Feeding pilot to Community Eligibility Program (CEP) and execute change if decision is made to institute.
- Continue fresh fruit and vegetables program with USDA and PDE
- Retain student meal “best practices” designation per USDA and PDE
- Implement two year Season Extension grant from USDA to freeze seasonal produce for off-season use

STRATEGY 4: WE WILL INCREASE BREAKFAST MEAL PARTICIPATION TO X% OF DAILY ATTENDANCE

- Market breakfast availability to students
- Continue multi-year breakfast study with Temple University to reduce obesity
- Continue and expand breakfast in the classroom to improve breakfast meal participation

STRATEGY 5: WE WILL ANALYZE OUTCOMES AND EXPAND SUCCESSFUL NUTRITIONAL EDUCATION AND COMMUNITY PARTNERSHIP PROGRAMS

- Participate in ‘Get Healthy Philly’ with City Department of Public Health

- Monitor and learn from 'Eatiquette' family style pilot via Vetri Foundation at Ziegler school for 2014
- Expand scope of formal student/ parent/ stakeholder feedback program and continue to offer Food Service 101/201 to stakeholders and partners
- Expand Farm to School pilot; leverage 'Eat Right Now' nutritional education partners
- Retain Wellness Policy which limits snacks and mandates fruit juice/water only

STRATEGY 6: WE WILL PROVIDE SAFE, SECURE AND PLEASANT CAFETERIA ENVIRONMENTS

- Comply with state and local food safety and sanitation regulations
- Provide appropriate certification and training programs for school food service directors, managers and cafeteria workers, according to their levels of responsibility
- Share with custodial staff a clear set of standards to maintain cleanliness in dining facilities

STRATEGY 7: WE WILL PROVIDE STUDENTS WITH ACCESS TO DRINKING WATER AT MEALS AND THROUGHOUT THE DAY

- Partner with Water Department to install drinking water sources where drinking fountains do not exist, are in poor repair, or do not provide safe drinking water

TRANSPORTATION

Description of Transportation Division

School District yellow school bus operations meet the daily student transportation needs of more than 35,000 students across 264 schools. SDP yellow school buses are responsible for 24% or 417 routes of a total of 1,415 daily routes with over ten thousand bus stops. 76% of routes are contracted to external bus and cab contractors. The School District central office transportation management team is responsible for overseeing daily operations, providing functions such as customer service (or dispatch), contractor and in-house performance management, route scheduling, vehicle maintenance, and garage management. The School District plans and monitors performance on both internal and contracted bus routes.

Goal for Transportation Division

We will provide SDP students with a safe, comfortable and timely ride to school that lasts less than an hour.

Performance Goals:

- 100% of children arrive on-time to school
- Lower accident rate below national standards
- Reduce transportation costs by 20%
- Ensure 100% of special education students are afforded safe, timely bus transportation within three days of school enrollment
- 100% of children ride times under 1 hour

Key Performance Indicators (include both district and contractors):

- Average annual transportation cost per student
- Average annual school operating cost per bus
- Average riders per bus run
- Average bus runs per route
- Average bus run duration
- Chargeable accidents per 10,000 operating miles
- Routes per Bus
- Drivers per Bus
- Average Age of Fleet
- Total Miles per Bus
- Deadhead Miles per Bus
- Average Cost per Mile

Strategies and Actions for Transportation Division

STRATEGY 1: WE WILL REFINE AND UPDATE OUR ORGANIZATION STRUCTURE AND STANDARD OPERATING PROCEDURES TO IMPROVE CUSTOMER SERVICE AND EFFECTIVE CONTROL OF OPERATIONS

- Establish uniform written policies and guidelines for public and charter school transportation
- Realign specific responsibilities regarding long term planning, operations, fleet management and business administration

- Track Key Performance Indicators for both district and contractors each quarter.
- Create a communications plan to inform and obtain feedback from staff and customers about the changes
- Update job descriptions, hiring policies and provide training to ensure staff has the necessary skills and experience to support anchor goals
- Establish a reporting protocol for all personnel

STRATEGY 2: WE WILL OPERATE EFFICIENT, SAFE AND TIMELY BUS ROUTES

- Implement the Automated Bus Routing System (ABRS) called Compass to improve and maintain bus routes and schedules
 - Reengineer foundational business rules and work processes to facilitate computer-based route planning and scheduling
 - Continue installation of GPS on all buses
 - Continue to identify routes that have low capacity or time utilization while bringing Compass online
 - Complete staff training on use of route planning and GPS/AVL software
 - Communicate changes to all staff including different responsibilities for route planners and supervisors and greater accountability for drivers and contracted bus operators
 - Consolidate bus stops to reduce stopping time
 - Explore the possibility of staggering school bell times for both Charter and District schools to facilitate multi-run bus assignments so buses can serve more than one school
- Perform annual evaluations to determine efficiency gains achieved
- Work with principals to create a uniform window for buses to arrive at schools to one half hour prior to the start of school

STRATEGY 3: WE WILL IMPROVE THE RFP FOR TRANSPORTATION CONTRACTORS TO SET CLEAR STANDARDS FOR PERFORMANCE

- Develop standard set of RFP specifications and service requirements for all situations where we outsource transportation services in order to reduce costs on a per-bus basis, better define expected standards of service, simplify pricing components to minimize risk exposure and overcharges, and improve contract administration and oversight
 - Create defined enforceable contractor performance standards linked to outcomes and explore penalties for below standard performance
 - Limit maximum areas awarded to one contractor in order to ensure competition and mitigate risk
 - Create weighted scoring matrix that considers cost as well as contractor qualifications, experience, and strength of approach
 - Evaluate contractors' performance annually
 - Lower contractor vendor cost

STRATEGY 4: WE WILL IMPROVE THE CONDITION OF OUR BUS FLEET AND LOWER MAINTENANCE COSTS

- Create a comprehensive maintenance plan for the SDP-owned fleet
 - Define criteria for determining what transportation assets are to be retired, replaced or outsourced to private bus contractors

- Explore reforms that will lower parts and labor expenditure on a per-unit basis
- Evaluate fleet maintenance and repair facilities.
 - Invest in core group of maintenance and repair facilities where tooling and equipment is adequate in order to improve technician productivity
- Increase focus on preventative fleet maintenance
- Improve inventory control for replacement parts, fuel, fluids, lubricants and capital equipment
- Explore less costly and more efficient parts distribution systems to the existing Broad Street garage distribution hub
- Solicit competitive proposals for automotive parts to reduce costs through aggregation
- Replace between 20-50 buses with new vehicles over next three years

STRATEGY 5: WE WILL STRENGTHEN MONITORING AND CONTROL PROCEDURES FOR ON-TIME SERVICE

- Conduct regular performance monitoring through monthly data collection and analysis of performance
- Hold monthly meetings with both internal and external bus operators to define and address problem trends and specific operational issues
- Conduct random bus arrival/departure checks and review GPS/AVL technology regularly for schedule deviations
- Lower driver absenteeism by showing drivers they are appreciated; improve morale and attendance and underscore importance of work
- Take appropriate action with contractor when performance is insufficient

STRATEGY 6: WE WILL ANSWER INQUIRIES AND COMPLAINTS FROM OUR CUSTOMERS QUICKLY AND THOROUGHLY

- Improve the tracking and follow-up on call center requests regarding busing issues
- Establish a customer service manager position to supervise call centers staff, handle complex requests and follow-up on customer complaints
 - Monitor call response through call tracking database
 - Vet and prioritize calls sequentially to quickly resolve standard requests, such as a student's bus assignment or stop location, and forward more complex issues to quality assurance managers
 - Relocate call center to main office area where management staff are available when needed to assist customer service representatives
 - Set standards and expectations of response by establishing service levels
 - Create online or email problem and response system
 - Provide immediate and timely proactive outreach to Principals, schools and parents when services are disrupted
- Utilize technology solutions to identify off schedule buses through GPS/ AVL and inform schools when buses are running late. Provide a way for schools to document lateness or problems
- Implement a staff training program for customer service representatives that includes methods to professionally and efficiently handle difficult people in a high stress environment

STRATEGY 7: WE WILL MONITOR THE PERFORMANCE OF BUS CONTRACTORS

- Conduct monthly checks of garages and annual license check of drivers
- Conduct monthly bus inspection checks and audit of working cameras and GPS use
- Conduct monthly meetings and require monthly performance reports

STRATEGY 8: WE WILL ENSURE OUR CHILDREN ARE SAFE AND COMFORTABLE AS THEY RIDE TO SCHOOL

- Require bus contractors to submit an accident immediately. Copy of the Accident Report is to be submitted to the School District Transportation Office within 24 hours after the occurrence. Contractors will provide daily, weekly, monthly, quarterly and annual exception reports of driver speeding events, accidents and other pertinent details
- Track all accidents and incidents that impact passenger safety
- Provide safety training to bus drivers and bus attendants
- Create qualified list of candidates for bus attendants to monitor the activities of special education students

PROCUREMENT

Description

The Office of Procurement Services assists schools, academic and operational departments in obtaining quality goods and services at competitive prices from responsible suppliers in accordance with the Pennsylvania School Code and Board policies.

We purchase supplies, furniture, equipment, textbooks, food and services. We manage the Decentralized Purchasing Program and prepare and distribute supplies and services. Additionally, we sell surplus and obsolete equipment and coordinate development of specifications as required.

Goal

Obtain quality goods and services for the School District at competitive prices from responsible suppliers through an ethical, transparent process.

Performance Goals:

- Reduce cost on annual supplies and services by 10%
- Reduce or maintain District spend by 10%
- Increase participation on the competitive purchases by 20%
- Reduce the preparation time to 4 weeks for bids and RFPs

Key Performance Indicators:

- PALT –Number of days from receipt of requisition to issuance of purchase order
- Total dollars in district procurement spending (breakout in various segments)
- Procurement Savings/cost avoidance
- Procurement transactions per professional
- Cost per purchase order

Strategies and Actions

STRATEGY 1: WE WILL PROVIDE SUPERIOR CUSTOMER SERVICE BY ENSURING PROCUREMENT OPERATIONS ARE PERFORMED EFFECTIVELY, EFFICIENTLY AND WITH THE UTMOST ACCOUNTABILITY

- Revise and streamline existing procurement processes, add innovative practices, and use available technology to allow SDP to buy the right quality material in the proper quantity, at the right time, from the proper source at the best price.
 - Assign innovations manager to upgrade technology, create cost-saving practices and implement key initiatives
- Develop key performance indicators and provide for bi-annual (6 month) reviews with personnel
- Hold a kick-off meeting with stakeholders before issuing solicitation documents to define the objective of the RFP and to discuss the sourcing strategy, timeline and anticipated results
- Perform spend analysis to determine the department's needs and estimated total cost analysis prior to issuing the solicitation
- Review cooperative purchasing agreements, state contracts, and other existing contracting methods before issuing the solicitation

- Develop standardized scoring rubrics with weighted criteria for different types of bids so program staff do not have to create a new rubric for each bid issued
- Develop capacity to write superior program specifications for bids and RFP's
 - Perform market research on needed products and services prior to issuing RFP and going out into the market to check latest specifications and available products and services as well as expected pricing to better inform the process. Share this research with program divisions and schools
 - Advise program divisions and schools regarding quantities of products needed by tracking prior quantities ordered for multiple years
- Oversee contracting process including negotiation process and vendor performance. Evaluate performance through an audit where possible or through interviews with the end user. In concert with the program offices, perform periodic business reviews with contractors involving large or high exposure expenditures with the intent of identifying shortcomings, improving efficiencies and reducing overall costs
- Start an initiative to audit Requisition documents (price / quantity / materials or services provided), and systematically reduce Requisition purchases by defining end-users needs and providing contracts to end users
- Pay vendors in a timely manner
 - Place the responsibility for proving that a product or service was delivered or completed onto the vendor by requiring submission of invoices and signed corresponding packing slips. Create a web based solution to process invoices and facilitate timely payment of vendors
 - When schools do not acknowledge receipt in a timely manner, accounts payable should accept proof of delivery as the necessary proof to pay the vendor
 - Allow procurement to send Purchase Orders by email rather than U.S. mail to lower processing costs and delivery time
- Create automatic notifications using calendar software for expiration and milestone dates for all contracts to allow for easy monitoring
- Monitor customer and vendor satisfaction via surveys

STRATEGY 2: WE WILL DEVELOP FORWARD-LOOKING PLANS FOR PURCHASE OF GOODS AND SERVICES TO DEVELOP BETTER AGGREGATION OPPORTUNITIES AND ACHIEVE COST EFFICIENCIES

- Enhance opportunities to consolidate purchasing volumes to secure the best price for goods and services
- Require all school facilities and divisions to submit estimated annual procurement and spending plans to assist in spend analysis and identification of procurement aggregation opportunities. Procurement will perform qualitative analytics to help schools develop their budget
- Explore moving away from a traditional low-price-sealed-bid process by bringing detailed data and buying leverage to bear in negotiations with vendors to lower prices and improve value for the SDP
- Assemble negotiating teams comprised of the personnel from the program offices and Procurement to negotiate with potential vendors for goods and services that meet the desired standards and specifications of the users and garner additional savings on certain large dollar contracts such as satellite meals and bus routes

- In concert with Facilities and Food Services, bundle MRO (maintenance, repair and operating supplies) items and solicit pricing to offer greater volumes of business to fewer suppliers with the intent of reducing the cost of MRO supplies
- Identify and remove unnecessary barriers or burdens which may result in increased risk and/or cost to businesses interested in doing business with SDP

STRATEGY 3: WE WILL CREATE AND IMPLEMENT A SURPLUS PROPERTY PROGRAM TO PROVIDE A COST EFFECTIVE, TIMELY AND EFFICIENT PROCESS TO REALLOCATE RESOURCES WITHIN THE SDP AND TO DISPOSE OF UNNEEDED GOODS AT THE HIGHEST PRACTICAL RATE OF RETURN

- Improve inventory control to provide optimal use of existing supplies and equipment within SDP
- Offer more “open houses” where teachers and principals can select used equipment to meet their needs
- Provide an effective transfer process to move surplus supplies and equipment from one school or department to another (surplus property are items no longer needed by the department that made the initial purchases)
 - Reduce unnecessary purchases through the use of existing assets
 - Provide for the sale at auction of equipment and supplies no longer of value to the SDP
- Revise electronic waste recycling policies in partnership with Office of Information Technology to ensure SDP is disposing of electronic waste in an environmentally conscientious manner for the lowest rates
- Implement a textbook inventory to accurately track the purchase and use of textbooks in order to reduce overbuying and ensure that every teacher and student has the textbooks they need. Continue the Textbook Delivery Initiative to reduce vendor shipping costs
- Explore potential models to incentivize schools to report surplus property such as returning a percentage of the sales revenue back to the school

STRATEGY 4: WE WILL USE BETTER DATA GATHERING AND CONSISTENT PROCUREMENT POLICIES THROUGHOUT THE SDP TO BETTER CONTROL SPENDING AND INVENTORY

- Create database that lists all procurement requests, the decision of the procurement office whether or not to finance the request, and a list of all bidders along with the awarded bidder and bid
 - Explore whether database should be built on dated Enterprise Resource Planning platform or a new system using Microsoft Access or Excel, two programs that personnel all have available for use
 - Use the database to manage contract information such as award documents, insurance certificates, payment information, change orders, milestones, and expiration dates
- Develop a pricing database to guide award decisions
- Develop an interdepartmental cross-training program in Operations to increase an awareness of each department's procurement needs and challenges, and to increase efficiencies across the Operations organization
- Identify and eliminate instances of wasteful and inefficient spending

STRATEGY 5: WE WILL INSPIRE PUBLIC CONFIDENCE THAT ALL CONTRACTS ARE AWARDED EQUITABLY AND ADHERE TO LEGAL AND ETHICAL GUIDELINES

- All procurement actions should be governed by the principles in both the SDP procurement and ethics policies and the national procurement standards embodied in the "NIGP Code of Ethics", as well as, the "Principles and Practices of Public Procurement"
- Identify the major categories where spending requests occur and report it quarterly to Finance and Academics
- Develop and introduce a MWBE participation program that encourages MWBE participation and obtains best value and price for SDP
- Communicate with potential vendors that SDP will be evaluating and selecting new vendors to encourage the maximum possible number of vendors to bid on SDP work
 - Create and implement a process to protect against conflicts of interest and avoid the appearance of unethical or compromising practices in business relationships, actions and communications
- Implement annual audits of all activity. Implement a more frequent audit schedule for high exposure, large dollar volume contracts
- Utilize a vendor evaluation of the SDP procurement process to validate and promote the existence of a fair marketplace
- Create a standard template to summarize the process and communicate with the SRC and the executive management

STRATEGY 6: WE WILL CREATE, MAINTAIN AND DISTRIBUTE PROCEDURES TO MAXIMIZE COMPETITION IN ORDER TO OBTAIN BEST VALUE

- Revise written purchasing policies and procedures to allow SDP to take maximum advantage of competitive bidding, volume discounts, and special pricing agreements
- Invite all potential vendors to become listed within a single registry of "approved vendors". Once registered, "approved vendors" will automatically receive solicitation for bids and can respond to bids electronically in order to increase efficiency
- Maximize vendor relationships with MWBE suppliers
- Improve marketing of procurement opportunities and contracts through the use of social media tools, email notices and online bidding tools
- Hold vendor forums

STRATEGY 7: WE WILL INCREASE OUR STAFF CAPACITY BY INCREASING THE SKILLS AND PRODUCTIVITY OF PROCUREMENT EMPLOYEES AND INCREASE THEIR INPUT IN PROCUREMENT DECISIONS

- Procurement staff will become experts in products obtained regularly by SDP
- Provide continuing education opportunities to our professional staff including negotiation skills and ethics training