An Efficiency Study of

Bridgeport Public Schools

for the Bridgeport Regional Business Council

Submitted by:

GIBSON
CONSULTING GROUP

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Executive Summary

The Bridgeport Regional Business Council ("BRBC") engaged Gibson Consulting Group, Inc. ("Gibson") to perform a brief overview of existing operational and management systems to identify possible efficiencies and cost savings for Bridgeport Public Schools ("BPS").

This study is being conducted as part of a multi-phased initiative to improve public education in Bridgeport. In 2006, the BRBC presented a Four Phase Proposal to the Board of Education with the goal of enhancing financial accountability and transparency as well as operational and management efficiency. Phases I and II –processes which identified the financial relationship between BPS and the City of Bridgeport and made recommendations for improved BPS financial autonomy and implementation of those recommendations – are complete. BPS is now in the process of implementing new information systems to provide more accurate, timely and meaningful financial reports, as well as a clearer understanding of financial performance and results.

The BRBC and a number of other partner agencies and organizations believe that the City of Bridgeport school system is in need of additional financial resources in order to improve the quality of public education. A broad coalition of community organizations have stated their mutual desire to be supportive of efforts to increase resources that impact the school system and improve the delivery systems through which those resources are invested.

In order to assist in making the case for added resources, and/or the case for more efficient and effective use of current resources, a clearer picture of income and expenditure needs is required, as well as a clear understanding of the operational and management efficiencies or inefficiencies that exist within the school system. The primary priority of the business community is for the current systems employed by the City of Bridgeport and BPS to be accountable and transparent. The ultimate goal of this assignment is to provide guidance that will enable the implementation of operational, management, and budgetary systems that are transparent, efficient, and have internal accountability.

This efficiency study represents Phase III of the BRBC initiative. The purpose of this study was two-fold:

1. Identify areas where BPS can reduce costs or increase revenues.

2. Identify areas of operations and organization which will require additional research, investigation, or investment to achieve improvements over the next three years.

The study included the review of current and historical BPS financial information, the results of reviews performed over the past several years, and operational data from virtually every area of the BPS operation. We also conducted extensive interviews of BPS and City of Bridgeport personnel, as well as BPS board members. The individuals interviewed during our study are presented in *Appendix A* of this report.

Because BPS is in the process of implementing new finance and human resources information systems (as a result of the previous phases of work), much of the historical financial and staffing data needed to conduct this study was not available. We were, however, able to collect current year staffing data and selected financial data to support an analysis of efficiency. Where applicable, BPS data were compared to industry standards or best practices. In other instances, internal analyses of processes yielded savings opportunities. As part of this study, we have made several suggestions to improve the implementation of these new information systems to maximize efficiency, data integrity, and transparency.

This report recommends changes in operations and staffing that will save BPS almost $7 million annually over the next several years. In **Table 1**, we have provided our best estimate of the long-term savings potential that BPS can realize, with some portion of savings achievable in the 2010-11 fiscal year. For most areas, we recognize that many factors, including existing collective bargaining agreements and current BOE policies, will need to be addressed in order to fully implement our recommendations. There are other areas, such as those in the Custodial, Central Office Staffing, and Purchasing sections of the report, which will need to undergo process re-engineering and automation in order to achieve recommended levels of efficiency. The savings in each area represent a target for reductions in annual costs. Furthermore, we have not included savings related to employee benefits or the separation costs associated with reductions in staffing levels not achieved through attrition.

Table 1. Summary of Savings

Area	Description	Targeted Annual Savings
Custodial	Staffing Levels	$913,000
	Summer Staffing	$200,000
Overtime	Custodial, Trades and Athletics	$775,000
Crossing Guards	Staffing Levels	$160,000
	Uniforms	$20,000
Facilities Use	Revise Policy and Enforce Fees	$789,000
Transportation	Revise Bell Schedules	$2,284,000
	Automated Routing Software	$342,000
Nutrition	In-Classroom Breakfast [1]	$750,000
Central Office Staffing	Payroll Processing	$300,000
	Purchase Requisitions [2]	$150,000
Purchasing	Targeted Competitive Pricing	$300,000
	TOTALS	**$6,983,000**

[1] Of this amount, $500,000 would be realized in the General Fund by allocation of expenses.

[2] Includes staff paid from both general and grant funds.

Each of these savings opportunities will require some difficult decisions by BPS management, such as reductions in positions and/or changes in policy or current practice. However, some of the position reductions could be achieved through attrition, but this will take longer to achieve the full benefit of the savings opportunity. In prioritizing the implementation of these recommendations, BPS should consider the amount of technical assistance required, the timetable for proper notification to and negotiation with applicable unions, the amount of the potential savings, and the relative difficulty of implementation.

In addition to the efficiencies/savings outlined in **Table 1**, BPS could realize additional General Fund revenues of approximately $6 million annually through the allocation of grant revenues (such as Title I) to indirect costs incurred by the General Fund. Currently, BPS does not allocate grant funds for indirect costs. As a result, other state and local funds are being used to support the administration of federal and state categorical grant programs. Most grant funds allow school systems to allocate grant funds for indirect costs but they must apply for an indirect cost rate and include that rate when applying for grant funds. Our recommendations for improvements in Central Office Staffing and Payroll would significantly reduce the costs related to accounting and clerical staff directly supported by grants. However, implementing changes in the accounting treatment for indirect costs could result in lower allocations for instructional programs. Most grant programs are designed to support the indirect costs incurred by school systems to operate and manage them. By not allocating indirect costs, BPS has been able to spend more on its programs, but its General Fund expenditures for managing those programs have gone unreimbursed. This has contributed to the current financial situation at BPS.

The remainder of this report is organized into the following four sections:

1. BPS Efficient Practices
2. Major Savings Opportunities
3. BPS Budgeting Process
4. Additional Areas for Study

Bridgeport Public Schools Efficient Practices

During the review, Gibson noticed several efficient practices currently employed by BPS. These practices are described briefly below.

1. Over the past several years, BPS realigned its schools to a more efficient grade level structure. Prior to this effort there were many types of schools with different grade-level configurations. BPS decided to align most schools in a PreK-8 and 9-12 format. This has contributed to improved grade-level alignment and coordination among teachers within a school, more efficient administration of schools, and a more effective support system to accommodate schools with similar needs.

2. BPS uses several software products at the schools which contribute to efficient transaction processing. One of the software products in use is a teacher substitute management system. Teachers and substitutes access this system remotely, and the system matches the teacher absence to a substitute that can fill the need. This avoids the use of school-based staff to receive teacher notifications by phone or email, contact substitutes, find the match, and do much of the recordkeeping. In another example, schools use an "auto-dialer" for notifying parents of absent or late students. The system interfaces with BPS' student information system, and automatically leaves recorded messages for parents. Similar to the substitute management system, the auto-dialer system minimizes the need for school staff to provide the information to parents over the phone or via email.

3. The Food and Nutrition Department is a well-run, efficient operation at BPS. Staff productivity is tightly managed through the use of efficiency performance measures such as Meals per Labor Hour. Procedures are standardized across campuses, and based on observations at several schools, nutrition operations are very well-organized and supervised. Further, BPS uses a central kitchen to support meals at many of the campuses, reducing the need for campus-level equipment and staff.

4. BPS uses the State of Connecticut Internet Service, which is free of charge. This avoids the need for third-party contracts to provide internet service and related security.

Major Savings Opportunities

During this review Gibson identified several areas for improved efficiency and cost savings at BPS. Despite the implementation of new information systems, many processes employed by staff at the school- and central office-level are highly manual and do not add value. Unnecessary spreadsheets, logs, and paper files are maintained, and system capabilities are not maximized, primarily in the areas of purchasing and payroll. This section of the report contains several recommendations that will help streamline operations, maximize the use of information systems, and reduce if not eliminate the work demands for several staff positions. In short, the work at BPS needs to be re-engineered to achieve these goals.

In other areas of operation, staff levels are not consistent with industry standards. This section of the report includes recommendations to bring staff levels in line with those standards, but not at the expense of service quality or responsiveness.

BPS could achieve additional savings by changing the way it performs certain functions, such as purchasing. Currently BPS and the City of Bridgeport operate a decentralized purchasing process. By centralizing this function to a greater degree, BPS could achieve far greater savings through bulk purchasing and the use of current technologies, such as procurement cards.

Some of the opportunities presented in this section of the report have been presented previously by BPS administration. We have provided alternative ways of implementing some of these savings opportunities that we believe will help obtain BPS Board member approval and where applicable, union approval.

Custodial Services

Staff Levels

The Facilities and Operations Department provides custodial services for approximately 33 schools and BPS administrative buildings. Custodians are classified in various position categories including custodian (1-5 levels), janitress, maintainer, service assistant, and part-time custodian. With the exception of one Custodian level 4 or 5 who serves as the Head Custodian, the general responsibilities are the same for all other position categories.

The Head Custodian is responsible for opening the school, checking the heating/cooling equipment, and liaising with the principal regarding facilities issues. He or she starts work at the beginning of the school day (around 7 a.m.) and works an 8-hour shift.

To maximize the effectiveness of its custodial staff, BPS has implemented night cleaning at each facility and the majority of the custodial staff members work an afternoon-evening shift. Except as discussed in the section of this report relating to non-school facility usage, custodians are able to perform their tasks when schools are unoccupied.

Using part-time staff can help balance the workload at smaller facilities. BPS employs seven custodial staff on a part-time basis; however, only one of these part-time custodians cleans a smaller facility (27,287 sq. ft.) where the assignment of part-time staff appears to have been made to achieve more efficient staffing levels.

According to the acting operations manager for custodial services, there has been some adjustment of custodial staffing levels in recent years. However, BPS has not undertaken a comprehensive analysis of custodial staffing taking into account the following factors:

- *Specific duties and schedule of each employee* – Certain employees, such as the Head Custodian, are required to be available during school hours. Collective bargaining agreements may impose limitations on the ability to employ custodial staff on a part-time basis, although doing so would enable more efficient allocation of resources.

- *Design/layout, or other school-related considerations* – The design or floor-plan of certain schools may make cleaning more time-consuming. For example, we learned that the Beardsley school lacks elevators making moving equipment between floors difficult and more time-consuming. The type of flooring, such as tile or carpet, may impact staffing levels, and significantly high use of portable classrooms also complicates cleaning duties.

- *Capacity* – As noted below, many industry staffing formulas include the counts of teachers, students and classrooms. Inefficient use of school capacity (low student-to-teacher ratios, low student-per-classroom ratios and low overall school enrollments) can result in staffing levels that are higher than the standards would ordinarily suggest.

- *Equipment status* – Older equipment can increase the time needed for cleaning tasks and require more custodial staff. Newer equipment, such as floor sweepers or polishers, which automate otherwise manual tasks, can enable lower staffing levels.

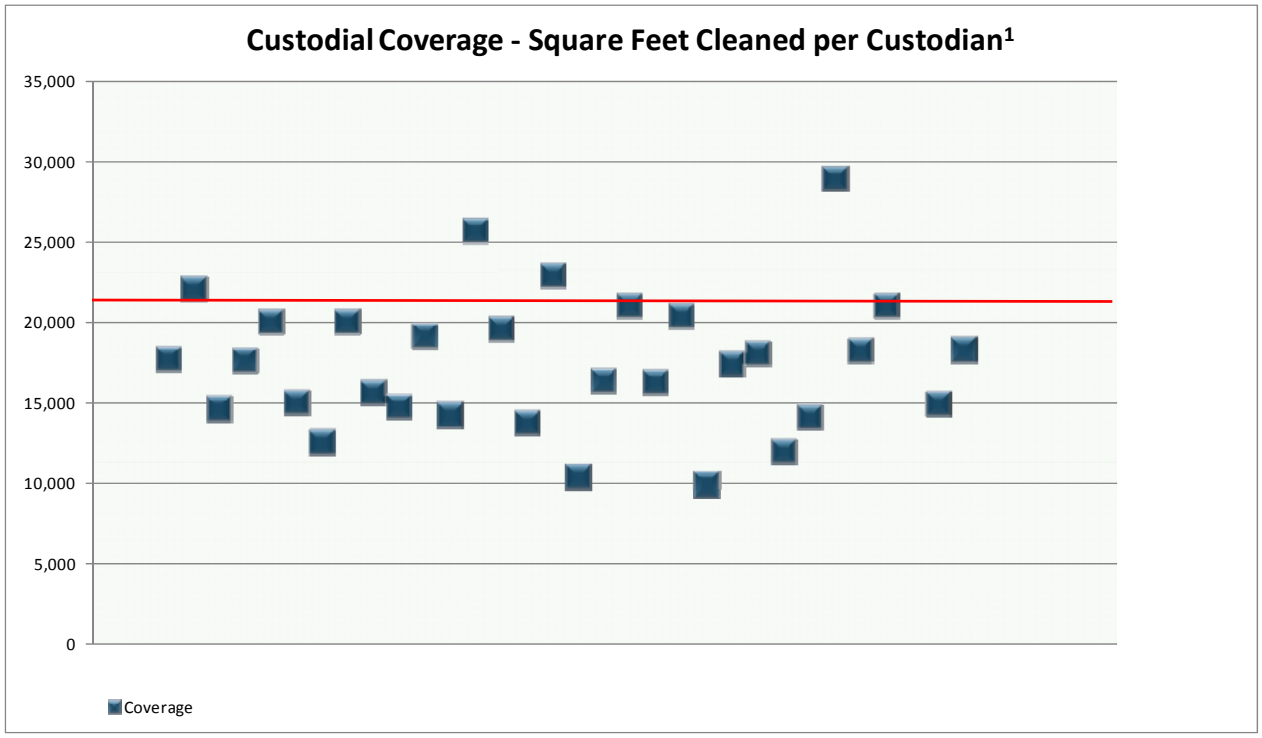
Appendix B presents the existing custodial staffing levels and other aspects of school utilization.

Many studies have been conducted to provide guidance regarding custodial staffing levels. The Association of Physical Plant Administrators, the Association of Facilities Engineering, and the Council of Great City Schools are just a few of the organizations which publish information to help administrators evaluate the resources needed for facilities support. Also, school associations in individual states, including California, Colorado and Michigan, have developed formulas for determining optimal staffing levels. Many of these formulas include counts of teachers, students and classrooms, in addition to facility square footage, in determining appropriate staffing levels. Application of any formula without carefully considering those factors noted above can negatively impact school cleanliness. Our recommendations are intended to promote efficient use of resources while maintaining a level of cleanliness that promotes a positive learning environment.

The Association of School Business Officials (ASBO) commissioned a comprehensive study of facilities operations to provide its members with guidance on a variety of operational issues. The study suggested that each custodian working an eight-hour (night) shift can maintain 28,000 – 31,000 square feet of school space with an acceptable level of cleanliness. This translates into an overall staff ratio – incorporating day shift needs – of approximately 22,000 square feet per custodian.

As shown in **Table 2,** Bridgeport facilities show a wide range of variability in custodial productivity, and most fall below an overall standard of 22,000 square feet. Each box on the chart represents the 2009-10 custodial productivity at a school or facility, measured as gross square feet of space cleaned per full-time equivalent custodian. The higher the ratio is the higher the productivity of the custodians and conversely the lower the ratio, the lower the productivity. While seven BPS facilities are above target level of 22,000 square feet per custodian, 27 fall below this target.

Table 2. Current Custodial Coverage per Square Feet, 2009-10



[1] Each box in the chart represents a BPS school or other facility.

Note: Whittier, Aquaculture and Adult Education facilities have been excluded from Table 2, because BPS custodians clean only a portion of the total space of each facility.

We applied the staffing standards to BPS schools/facilities with lower productivity levels to determine potential staff savings. This analysis included several assumptions:

- Most schools or other facilities will continue to require one custodian for the day shift; Bassick, Central and Harding high schools, along with Barnum/Waltersville School, will require two day-shift custodians.
- For those facilities where current productivity levels exceed the ASBO standards (Edison, Hall, Whittier, and the Administrative Building), we have recommended keeping staffing at current levels.
- Where fractional staff levels are calculated for the evening shift, we have rounded recommended staffing levels up.
- For facilities with only one custodian (Adult Education, Aquaculture, and Whittier), we have assumed that the custodian is assigned to the night shift.
- A Graffiti Team is discussed later in this section of the report.

Table 3 shows the recommended position changes by facility.

Table 3. Recommended Custodial Staffing

School/Facility	Sq.Ft.	Custodians	Day Shift	Evening Shift	Total	Recommended	Change
Adult Education (Learning Enrichment)	40,440	1	0	1	1	1	0
Aquaculture	38,370	1	0	1	1	1	0
Barnum/Waltersville [1]	176,832	10	2	5.9	7.9	8.5	1.5
Bassick	253,136	11.5	2	8.4	10.4	11	0.5
Cesar A. Batalla	146,000	10	1	4.9	5.9	7	3
Beardsley	70,553	4	1	2.4	3.4	3.5	0.5
Blackham	140,000	7	1	4.7	5.7	6	1
Black Rock	45,038	3	1	1.5	2.5	3	0
Bryant	50,000	4	1	1.7	2.7	3	1
Central	279,660	14	2	9.3	11.3	12	2
Classical Studies (Maplewood)	39,835	4	1	1.3	2.3	2.5	1.5
Columbus	85,814	5.5	1	2.9	3.9	4.5	1
Cross	66,415	4.5	1	2.2	3.2	3.5	1
Curiale	76,531	4	1	2.6	3.6	3.5	0.5
Dunbar	70,934	5	1	2.4	3.4	3.5	1.5
Edison	51,263	2	1	1.7	2.7	2	0
Hall	39,114	2	1	1.3	2.3	2	0
Hallen	47,998	3.5	1	1.6	2.6	3	0.5
Warren Harding	251,600	11	2	8.4	10.4	10.5	0.5
Hooker	62,172	6	1	2.1	3.1	3	3
JFK [2]	155,377	9.5	1	5.2	6.2	6.5	3
Geraldine W. Johnson	105,000	5	1	3.5	4.5	4.5	0.5
Longfellow	81,228	5	1	2.7	3.7	4	1
Madison	60,964	3	1	2.0	3.0	3	0
Luis Munoz Marin	104,100	6	1	3.47	4.47	4.5	1.5
Park City (Magnet)	54,099	3	1	1.8	2.8	3	0
Read	83,405	7	1	2.8	3.8	4	3
Roosevelt	98,324	7	1	3.3	4.3	4.5	2.5
Bridgeport Learning Center (Sheridan)	43,357	1.5	0	1.4	1.4	1.5	0
Skane Center	27,287	1.5	0	0.9	0.9	1	0.5
Jettie S. Tisdale	105,000	5	1	3.5	4.5	4.5	0.5
Whittier [3]	41,921	1	0	1.4	1.4	1	0
Winthrop School	89,508	6	1	3.0	4.0	4	2
Administrative Building	36,500	2	1	1.2	2.2	2	0
Graffiti Team		0	0	0.0	0.0	5	-5
Totals	**3,117,775**	**175.5**	**33**	**103.3**	**136.3**	**147**	**28.5**

Source: BPS Facilities Department
[1] Barnum School square footage includes Waltersville School
[2] JFK Campus includes Academic Building, High Horizons and Multicultural Magnet
[3] Whittier includes Make the Grade and Park City Academy

Graffiti is a particular problem at several of the Bridgeport schools. As a result, custodial staff must devote some portion of their time each week dealing with this issue, (i.e., cleaning and re-painting walls, etc.). A dedicated team of custodians responsible for removing graffiti would free-up other custodial staff time for regular cleaning and address the issue in a more efficient and effective manner.

We recommend that the Facilities and Operations Department form a team of 3-5 custodians tasked solely with remediating graffiti damage. If these custodians have spare time, due to lower levels of graffiti from time-to-time, they could be assigned as substitute custodians to fill in for regular staff.

Application of the staffing standards and forming a team to address graffiti would result in the net elimination of 28.5 positions. Applying the reduction of positions to the average salary level for Custodian I ($33,125) and Service Assistant ($30,979), BPS could save approximately $913,000 in salary expenditures in 2010-11 and in subsequent years, an additional 40 percent or $365,200 in benefits(a one-year time lag for benefits savings is consistent with prior BPS efforts to reduce staff levels).

One aspect that could be affecting the efficient allocation of custodians at BPS is the low utilization of some school facilities. Some formulas used by certain state associations consider the number of teachers, classrooms and students at each school in determining custodian staffing. The theory underlying this approach is that the demand on custodians is directly proportionate not only to the size of the facility, but also the population of each school (teachers and students) and the disbursement of that population among the school's classrooms. The California ASBO (CASBO) standard is based on the average of the following ratios:

- One custodian for every 13 teachers
- One custodian for every 325 students
- One custodian for every 13 classrooms

This formula assumes a certain level of capacity utilization in each school: each classroom can serve 25 students and each student requires approximately 55 square feet of space. To the extent that utilization of school capacity is lower than this standard, the efficiency of custodial staffing is negatively impacted.

The following factors of school utilization are negatively impacting the efficient staffing of custodians in BPS schools:

- *Students per Classroom* – Only 4 of 27 schools for which we received classroom data achieve the average capacity utilization ratio of 25 students per classroom assumed by the CASBO standard.

- *Custodians per Classroom* – Only three schools (Whittier, Aquaculture, and Curiale) achieve a level of 10 or more classrooms cleaned daily per custodian and twelve schools average six or fewer classrooms cleaned per custodian.

- *Custodians per Student* – As noted above, the CASBO standards assume that one custodian is needed for every 325 students. At BPS, this ratio ranges from a low of 28 students per custodian at the Sheridan/BPS Learning Center to a high of 369 at the Aquaculture Center. Eleven schools average less than 100 students per custodian.

BPS should be able to achieve the level of reduction in custodian staffing over the next three years by implementing the recommended staffing ratios. We suggest that the Facilities and Operations Department management review staffing on a school-by-school basis and evaluate the specific factors discussed above to develop a plan for reducing staff. For example, resources are currently being used to clean portables at two schools – Dunbar and Roosevelt – which already have fewer than 10 students per permanent classroom. The space utilization would suggest that the school could more efficiently use permanent space and discontinue using the portables which would eliminate cleanable space and lessen the workload for existing custodial staff.

Summer Workloads

Custodial staff members at BPS are appointed on a 52-week basis. In our experience, it is unusual to have all custodial staff appointed on full-year basis. Typically, custodial staff at each school is appointed for the full school term and a portion of the staff is appointed for the summer. Typically, each school's summer schedules and activities are analyzed and the actual number of custodians needed is determined as based on the following:

- *Summer School* – For summer school, a reduced work force may be able to handle the day-to-day cleaning duties based on the actual number of students attending summer school sessions. The Facilities and Operations Department should work with Assistant Superintendents for Youth Services, Elementary and High Schools & Alternative Education to identify the specific programs to be conducted at each school, including the number of students or adults, the actual days that the program will be conducted, and the portion of space at each school that will be needed. As noted above, efficient use of school space and staffing based on actual students participating can minimize the number of custodians needed for summer school activities. It is rare for the number of students (or adults for some programs such as ESL) involved in summer programs to equal those involved in the regular school session. For this reason, staffing custodians in the same numbers as during the regular term is not efficient.

- *Non-school Activities* – During the summer, other non-school programs are conducted. For these programs, other sources of funds are available. Administrators should determine whether the budgets for these programs can include funding for custodial, security or other support functions. If so, salary/wages and benefits for custodial staff should be allocated to other fund sources during this time. As discussed later in this report, indirect costs for custodial, security or other administrative functions may be included in the budget for certain programs that receive federal or state grant funding. When the grants are negotiated, the additional services necessary to support these programs should be considered.

- *Summer Cleaning Schedule* – During the summer, many school systems utilize the down time at each school to conduct deep cleaning. This cleaning includes activities such as the removal of furniture from classrooms so that floors can be stripped and waxed, maintenance on gymnasium floors, and other cleaning that can only be conducted when students and teachers are absent. Typically, a team of custodians is employed to conduct this cleaning on a school-by-

school basis while the schools are unoccupied. For those schools with significant summer programs, the schedule is compressed between the end of programs and the start of the fall school term.

- *School Start-up* – Typically, teachers return to work for the fall term 1-3 weeks before students arrive. During this period, only minimal custodial staff is needed to empty trash containers, sweep hallways and clean restrooms at the end of each day. Significant room moves or other start-of-term configurations of classrooms or other areas can be handled by the summer cleaning crew as part of planned deep cleaning.

Annual savings of approximately $200,000 could be achieved through a 15-20 percent conversion of the custodial workforce from a 52-week schedule to a 40-week schedule [25 custodians x 12 weeks x $661.62 average weekly salary]. This conversion could be achieved through attrition as opposed to layoffs. However, due to the notification and planning efforts required by the union, it would likely be 2011-12 before any savings in this area could be realized.

Overtime

BPS expenditures for overtime have increase dramatically over the past five years. **Table 4** shows overtime expenditures from FY 2006 through FY 2009.

Table 4. Overtime Expenditures, FY 2006 – FY 2009, Bridgeport Public Schools

Overtime Charged To	Code	2006	2007	2008	2009
Security	1680	223,627.51	270,125.88	296,364.45	275,524.13
Trades	2020	82,827.47	199,034.52	417,146.38	583,202.33
Custodians	2030	328,498.59	411,205.92	619,801.30	773,778.81
Athletics	1870	0	103,050.08	113,658.77	131,093.73
Other areas		35,207.86	15,619.83	16,350.59	17,281.73
Totals		**670,161.43**	**999,036.23**	**1,463,321.49**	**1,780,880.73**

Source: BPS Business Office

Expenditures for security overtime have remained level over this five-year period and increased at a rate consistent with general inflation levels. According to the Director of School Security, police officers (Special Officers) receive overtime for working on weekends. Each weekend, one officer is assigned each day for one eight-hour shift. Over the course of the year, expenditures related to this overtime would total approximately $25,000 [8 hours x 2 days per week-end x 52 week x $20.13 per hour x 1.5 straight OT rate]. Remaining overtime must relate to the use of facilities for non-school use (see ***Facilities Usage*** section of this report) or for hours incurred by Special Officers, Security Guards or School Monitors over and above their normal week-day schedules.

Overtime expenditures have ballooned over the four-year period by 176%. Expenditures for FY 2010 (through mid-January) for security ($311,533.20), trades ($255,925.56), and custodians ($581,259.16) appear to be on track to exceed prior year levels.

As noted in the ***Crossing Guards*** section of this report, we recommend curtailing overtime for crossing guards entirely. Reducing overtime expenditures for Trades, Security, Custodians and Athletics will require the following steps:

- Analyze overtime payments for each group and determine which individuals comprise the majority of costs. Identify the reason(s) for working significant time outside of normal working hours. Determine the reasons for increasing OT expenditures over the period presented in the table above.

- Evaluate the departmental procedures for authorizing and approving OT, including verification of actual hours worked.

- Assess the workload for each group and align the workforce and employees' schedules to meet the needs of the workload in each area.

Our recommendations for improvement in purchasing processes (see the ***Purchasing*** section of this report) will facilitate the reductions in overtime by shifting responsibility for purchasing from tradesmen to clerical staff and freeing their time for actual work. As we noted in the ***Custodial*** section of the report, BPS has sufficient resources to meet cleaning needs with fewer overtime hours. Better alignment of resources and facilities should eliminate custodial overtime, except as it relates to facility use by non-BPS entities. As noted in the ***Facility Usage*** section of the report, overtime costs should be matched with the related revenues from facility use fees to better track expenses.

For maintenance trades, we recommend the full implementation of SchoolDude (see the ***Software Implementation*** section of this report) to track the productivity of staff. Actual overtime should be documented on each work order to justify the need to complete work outside of the normal, scheduled work day. Reducing overtime expenditures for just tradesmen, custodians, and athletics staff to FY 2007 levels would save approximately $775,000 annually.

Crossing Guards

The City of Bridgeport charges BPS approximately $900,000 per year for crossing guards assigned to PK through 8 schools. The current force includes 101 crossing guards and 4 "spares" or substitutes (see **Table 5**). One of the existing staff is out on long-term medical leave.

Table 5. Crossing Guards Assigned to K-8 Schools, Bridgeport Public Schools

School/Academy	Crossing Guards	Spare Guards	Total
Barnum	1		1
Cesar A. Batalla	4		4
Beardsley	6	1	7
Blackham	2	1	3
Blackrock	2		2
Bryant	2		2
Classical Studies (Maplewood)	5		5
Columbus	1		1
Cross	4		4
Curiale	2		2
Dunbar	3		3
Edison	3		3
Hall	3		3
Hallen	4	1	5
Hooker	2		2
Geraldine W. Johnson	11	1	12
Longfellow [1]	6		6
Madison	3		3
Luis Munoz Marin	6		6
Park City (Academy)	1		1
Read	3		3
Roosevelt	9		9
Jettie S. Tisdale	4		4
Waltersville	7		7
Winthrop	2		2
Garfield[2]	2		2
St. Ambrose[2]	2		2
St. Ann's[2]	1		1
Totals	**101**	**4**	**105**

Source: City of Bridgeport

[1] One crossing guard is on long-term leave

[2]Non-BPS Schools

We noted the following with respect to the crossing guard workforce:

- BPS have significantly more crossing guard staff than is commonly found at urban school systems relative to their student population. One of reasons is that the school crossing guards supporting BPS actually extend their service into the neighborhoods, often several blocks from the school. Most school system crossing guards work only on streets surrounding the school property.

- BPS have very little control over or supervision of the crossing guard staff. Crossing guards are under the management of a City of Bridgeport employee. BPS has no control over schedule or salary levels.

- Crossing guards work an average of 1 hour and 55 minutes daily – approximately 10 hours per week. Three employees have longer shifts (2 hours 25 minutes or 2 hours 45 minutes) and two employees work approximately one hour each day.

- Crossing guards received over $70,000 in overtime pay in 2009, although no guard has a schedule exceeding 15 hours weekly.

- BPS pays for 5 crossing guards at non-BPS (St. Ann's, St. Ambrose, and Garfield).

- Beginning in 2010, crossing guards receive a uniform allowance, total expenditures for which are forecasted at $25,000.

- Assignment of crossing guards does not correlate with enrollment at each school. Beardsley School (with 396 students) has seven guards while Blackham School (with 1,065 students) has only two.

BPS should employ its own crossing guards for the streets contiguous to its schools. This should be done based on need (such as number of crossing points and traffic patterns). Safety beyond those boundaries should be the responsibility of the City of Bridgeport.

We recommend the following:

- School administration and principals should carefully review automobile and pedestrian traffic patterns, as well as student ingress and egress from school grounds, to determine those locations which require crossing guards.

- BPS, with the City of Bridgeport, should share responsibility for administration and oversight of the school crossing guard workforce.

- Schedules and duties should be assigned by BPS in consultation with the principals of each school.

- Overtime pay should be eliminated for existing crossing guard staff.
- BPS should employ crossing guards for areas directly contiguous with the school grounds; the City of Bridgeport should evaluate the need for crossing guards or other safety measures – pedestrian bridges and upgrades of pedestrian crossing signals – at intersections beyond the contiguous streets.
- Provide uniforms for each crossing guard at the time of hire and once every three or four years. Cleaning and more frequent replacement would be the responsibility of each crossing guard.

Eliminating overtime pay for crossing guards would save approximately $75,000 based on the forecast of expenditures in FY 2010. Changing the uniform policy would save approximately $20,000 annually.

If BPS were to employ no more than four (4) crossing guards at each school, it would require approximately 80 crossing guards and four (4) spares. The cost of the workforce would be approximately $160,000 less than the current charges from the City of Bridgeport. The City of Bridgeport would need to evaluate the need for additional guards beyond the immediate grounds of each school.

Facilities Usage

Bridgeport Public School facilities are utilized by a variety of community organizations including the Lighthouse program, City departments, Girl Scouts, faith-based groups and Extreme Connecticut Wrestling. BPS has established policies for charging each group fees for use of the facilities that include building use, custodial and security components depending on the specific usage requested. Many of the organizations request and receive waivers of fees from the BPS Board of Education. Fees for facilities usage and waivers granted in FY 2010 are summarized in **Table 6.**

Table 6. Fees for Facilities Usage and Waivers Granted, FY 2010, Bridgeport Public Schools

Fee Type	Fees	Waivers Granted	Net Payment
Building Use	$996,885	$974,285	$22,600
Custodial	$879,340	$782,250	$97,090
Security	$591,442	$238,648	$352,794
Totals	**$2,467,667**	**$1,995,183**	**$472,484**

Source: BPS Facilities Department

Note: Information in this table includes only activities during the school year (September 2009 through May 2010) and excludes summer programs.

Although a variety of organizations use the BPS facilities, the significant percentage of the waived fees relate to a few municipal and BOE-related organizations.

The building use component of the usage fees is essentially a rental charge for using a building which the local taxpayers have funded. There is no incremental expense to BPS for allowing local organizations to use its facilities. However, the security and custodial components represent additional costs for security guards and custodians, including overtime when scheduled events impact cleaning schedules. In addition, BPS incurs expenditures for utilities that are not part of the facility use fee.

BPS sets policies for use of educational facilities and those policies establish the terms and conditions for groups to use the buildings depending on the type of organization: municipal agency, civic, cultural, or youth group, or other type. The policy does not make clear those criteria that will be used in determining how and when fees for security, custodial, and cafeteria services will be assessed or waived. Waiver of fees for custodial and security services merely shifts burden for real costs from the group using the building to BPS, and ultimately impacts the resources available for educating students.

We recommend the following:

- Policies for building use should be reviewed and that, once these policies are clearly established and communicated, the fees should be enforced. Waivers could be established in advance for certain types of organizations, but not for individual organizations. This will allow BPS management to charge and waive fees without a Board vote for individual facility use requests. BPS could include the names of the organizations and the amount of fees charged or waived on the consent agenda for Board approval.

- BPS should consider eliminating the various components of the usage fee and replace all charges with one fee that includes the estimated costs of security, custodial, utilities, and administrative activities. Standard fees could be developed for hourly, daily, or weekly use of facilities. Under this approach, facility users would not be charged a rental fee, but fees related only to the incremental operating costs incurred by BPS in providing the resources to operate, clean and secure the facility.

- The BPS Business Office should establish accounting codes for security and custodial personnel to code their time in order to better track revenues and costs associated with facility usage.

- Overtime incurred by security and custodial personnel related to facilities use should be segregated from other non-revenue overtime for better management of overall costs (see the ***Overtime*** section of this report).

The savings in each area represent a target for reductions in annual costs and will require operational changes and process re-engineering over the next several months to fully realize. Furthermore, we have not included the additional savings related to employee benefits or the separation costs associated with reductions in staffing levels.

A portion of the fees for custodial and security services represents reimbursement by facility users of overtime incurred by the related staff in these areas. In a previous section of this report, we made

recommendations for reducing overtime expenditures; therefore, we have reduced the amount of savings potential for facilities use to avoid double-counting the same overtime expenditures.

Eliminating the building use component (or charging only for-profit organizations a surcharge, for example) and discontinuing the practice of waiving other component fees would result in additional annual revenues of approximately $789,000, as indicated in **Table 7**.

Table 7. Savings from Facilities Usage, FY 2010, Bridgeport Public Schools

Area	Waivers Granted	Overtime [1]	Net Savings
Custodial	$782,250	$31,292	$750,958
Security	$238,648	$200,666	$37,982
Totals	$1,020,898	$231,958	$788,940

Source: BOE Facilities

[1] Represents unreimbursed overtime expenditures related to external use of BOE facilities through 3.1.10

Transportation

The BPS Transportation Department is responsible for home to school transportation for regular and special needs students attending any public, private, charter, or parochial school in the Bridgeport area. The department is also responsible for student transportation for summer programs, school activities, educational field trips, and extracurricular activity trips for all schools. The mission of the Transportation Department is to transport students as safely and efficiently as possible to and from school and school activities.

The Transportation Department contracts with a private company, First Student, to provide all transportation for students in the regular education program and about one-half of transportation services for special needs students. First Student has a fleet of 114 regular school buses (Type I) for the regular education program to operate approximately 240 daily runs to public elementary schools, high schools, and other public school programs, and 88 daily runs to private and parochial schools. About 7,500 students in public schools and 1,000 students in private and parochial schools are transported to and from school each day.

First Student and BPS each serve about one-half of the daily trips to transport 2,200 special needs students. First Student has a fleet of 59 mini-buses (Type II) and 9 mini-buses with wheelchair lifts. The BPS Transportation Department has a fleet of 24 mini-buses (Type II), four with wheelchair lifts, and three 7-passenger vans.

The total cost for transporting all students (public and non-public) in 2009 was approximately $13 million and BPS received approximately $4 million (29 percent of expenditures) in state support and inter-district reimbursements. In 2009, the per-student costs for transportation was $900 for the public

school regular program, $1,060 for non-public schools, and $2,700 per student for special needs transportation.

The staff of the Transportation Department includes:

- Transportation Director
- Transportation Specialists (3)
- Transportation Dispatcher
- Drivers (23, 4 currently vacant)

The existing contract with First Student is based on a cost per-vehicle, per-day. Each regular bus costs $317 per day for 183 days per year, or about $58,000 per bus annually. Each special needs bus costs $304.50 per bus per day ($309.50 with a wheelchair lift), or about $55,700 per bus annually (or $56,700 with wheelchair lift). The contract was negotiated for First Student to provide 2.5 hours of service in the morning and 2.5 hours in the afternoon, or a total of 5 hours per school day. The 2.5-hour time period allows each bus to operate up to 3 trips (or "runs") each morning and 3 trips in the afternoon. The more trips that a bus can make in each time period, the more students are transported per bus, and the fewer total buses are required to provide transportation to all students.

BPS' request for proposals for transportation services in 2005 specified that contractors would be required to provide up to three trips each morning and afternoon if time permitted. BPS intended to revise school bell times to allow three trips each morning and afternoon, but according to the transportation director, opposition to revising the bell schedules arose from administrators and parents. Currently, each bus operates two trips in the morning and two in the afternoon.

BPS can reduce the expenses for student transportation if bell times are adjusted to permit as many school buses as possible to operate three trips each morning and afternoon. The revised bell times will optimize the current cost structure and will reduce the total number of buses required each day. The annual savings per bus saved is $58,000 for regular student transportation and about $56,000 for special needs student transportation.

Without additional analysis to determine the number of bus riders that would be affected by the revised bell schedule, an accurate count of the buses required (and the reduction of the number of buses operating) cannot be completed. However, a conservative estimate of a 20 percent reduction in the number of regular buses and special education mini-buses is not unreasonable. Estimated annual savings in transportation costs is shown in **Table 8**.

Table 8. Reduction in Buses in Service, Bridgeport Public Schools

Bus Type	Buses in Service	Reduction	Cost per Bus	Savings
Regular	114	22	$58,000	$1,276,000
SPED Mini-Bus	92	18	$56,000	$1,008,000
Totals	**206**	**40**		**$2,284,000**

Source: BPS Department of Transportation

BPS began implementation of Transfinder, a software system for devloping bus routes and schedules, in 2009 under the direction of BPS' former Chief Financial Officer. Automated routing systems can reduce the need for buses by significantly reducing the miles driven by each bus daily. The software also facilitates the collection of data and provides reporting tools to improve the information available regarding transportation costs. Industry standards estimate savings using automated routing software at approximately 8 percent; however, many school systems cover a much wider geographic area than Bridgeport schools.

We recommend that BPS dedicate resources, including hiring an information technology professional, to complete the implementation of Transfinder for the 2010-11 school year. Conservatively estimating that the system will allow the transportation department (or its contractor) to reduce miles driven by 3 percent, BPS could achieve approximately $342,000 in savings for FY 2011 [3% of 206 special education and regular buses x $57,000 average annual cost per bus].

Other opportunities for cost savings in the transporation area are possible, but will require additional research and analysis, and, in some cases, will require negotiation with affected union leadership. Issues for further study include:

- *Vehicle Maintenance* – Outsourcing bus maintenance currently performed by the City of Bridgeport could lower costs. This was previously attempted by BPS, but because of improper notification to the unions, the effort was successfully grieved and later abandoned. An alternative approach would be for the City of Bridgepoert to change certain employee work schedules to prevent the charging of overtime for BPS bus maintenance.

- *Contractual Performance Measures* – The agreement with First Student does not include provisions establishing the maximum age of the bus fleet or for monitoring performance (route completion, on-time measures, complaints etc.). Terms should be included in future contracts specifying penalties for failure to meet established performance standards.

Food and Nutrition

General

The Food and Nutrition Department ("Nutrition") is a highly efficient and well-managed operation at BPS. Nutrition employs 278 staff at 35 schools and the central BPS Nutrition Center as shown in **Table 9**.

Table 9. Food and Nutrition Department Staff, Bridgeport Public Schools

Function	Staff
Supervision– Nutrition Center	5
Accounting, Payroll and Clerical	8
Custodial and Inventory Management	13
Nutrition Center Production Staff	25
School Cafeteria Staff	227
Totals	**278**

Source: BPS Business Office and Food and Nutrition Department

The Department provides approximately 44,000 breakfasts, 332,000 lunches and 867,000 snacks on a monthly basis. Nutrition operates full cafeterias at most of its schools and hybrid kitchens at others where food is processed at the Nutrition Center and limited production occurs at the school. This model is more efficient and allows food to be packaged in a way to minimize staff needed at the individual school cafeterias.

Cost Allocation

The Nutrition Department currently operates on a break-even basis, that is, it does not require a subsidy from the General Fund for its operations. However, only a portion of the allowable expenditures allocable to Nutrition are being absorbed by nutrition operations. Federal regulations permit the school system to allocate certain expenditures to nutrition operations, including utilities, pest control, trash removal, security, and janitorial services. Also, any expenditures for equipment related to utility services can be allocated to the cafeteria operations.

The **Table 10** below shows those costs currently allocated to Nutrition.

Table 10. General Fund Expenses Allocated to Nutrition, Fiscal Year 2009-10, Bridgeport Public Schools

Expense Type	Amount
Custodial expenses	$212,000
Utilities – Electric	$90,000
Utilities – Gas	$40,000
Totals	**$342,000**

Source: BPS NutritionDepartment

Our understanding is that the amount of these custodial and utility expenses charged to Nutrition were largely determined based partially on analyses conducted years ago, and negotiated based on what was perceived to be equitable. Some of the factors that should be considered in determining the expenses to be allocated to nutrition include: the proportion of the total square footage of the school occupied by the cafeteria, actual utility costs incurred at each school, the number of cutodians assigned to cafeteria duty, and the number of hours each day that custodians devote solely to cleaning after meals. Also, much of the trash disposal at each school is comprised of cafeteria waste, and no estimate has been made of the costs associated with system-wide trash collection.

We did not have available to us information to determine how much of each school's floor plan is comprised of the cafeteria. However, utilities expense (electricity, gas and water) exceeded $7,000,000 in 2009. The allocation to Nutrition was less than 2 percent of those costs. Assuming that the cafeteria at each school comprises 5 percent of the usuable floor space, an additional $220,000 could be allocated to Nutrition annually.

Similarly, trash removal related to Nutrition is likely a larger percentage of overall costs. BPS incurred approximately $234,000 in FY 2009 for refuse and recycling expenses. Assuming a 25 percent share of this cost, an additional $50,000 would be allocable to Nutrition.

Refinement of the estimates above and similar analyses of custodial costs and other expenses would be likely to generate other costs directly related to Nutriton. We believe that a reasonable estimate of the annual costs fully allowable and allocable to Nutrition would exceed $500,000 annually based on the size of the school system. As noted above, Nutrition operates on a break-even basis. Therefore, additional costs can be allocated and absorbed by Nutrition only if additional revenues or reductions in existing costs in the same amount can be achieved.

In-Classroom Breakfasts

In discussions with the Nutition director, we learned that Nutrition currently serves only 44,000 breakfasts monthly while over 332,000 lunches are served. Some schools have implemented in-classroom breakfasts; extending this program system-wide would provide a source of revenue to absorb additional allocated costs.

Currently, only one-third of elementary schools participate in the in-classroom breakfast program. Despite efforts to promote this program in all of the elementary schools, Nutrition has not been able to overcome the resistance of some teachers or staff to providing all students with breakfast at the start of the day in the classroom.

The program is a tremendous benefit to students by providing a convenient, energizing start to the academic day. Numerous studies have shown that a nutritious breakfast can improve cognitive functions and improve academic performance. Nutrition has selected breakfast items and packaged them in such a way to be "custodial friendly" and will work with each school's principal and teachers to tailor the offerings to the demands of the students.

Over 80 percent of BPS' students are eligible for free meals; therefore, the federal breakfast program provides reimbursement for each meal served. The only incremental cost of the program is food and packaging costs; no additional staff would be required to implement the program at the remaining elementary schools.

BPS Nutrition has estimated that over $1.5 million in additional revenue would be generated from the full implementation of the program. Incremental costs associated with the program would be approximately 50 percent of revenues, yielding over $750,000 annually of net revenues to absorb the additional allocated costs discussed above.

Central Office Administration

MUNIS System Implementation

BPS implemented the MUNIS financial information system beginning in July 2009 and the MUNIS payroll module in January 2010. The conversion from the legacy systems occurred without significant disruption of operations, and employees received compensation (paychecks or electronic direct deposit) without major, systemic problems. However, project management, system integration, and data conversion issues have prevented the seamless transition to the new system and the availability of financial information.

Benefits of an integrated information system have not been realized yet. For example, BPS could not provide our team with reliable, system-wide financial data and the Business Office has not been able to prepare comprehensive financial reports for all areas of BPS operations. Also, major financial processes for purchasing and payroll are still largely paper-intensive and occur outside of the MUNIS system. School and department personnel have not received adequate training regarding the MUNIS system and, as a result, workflow features for streamlining the routing of paperwork are not utilized.

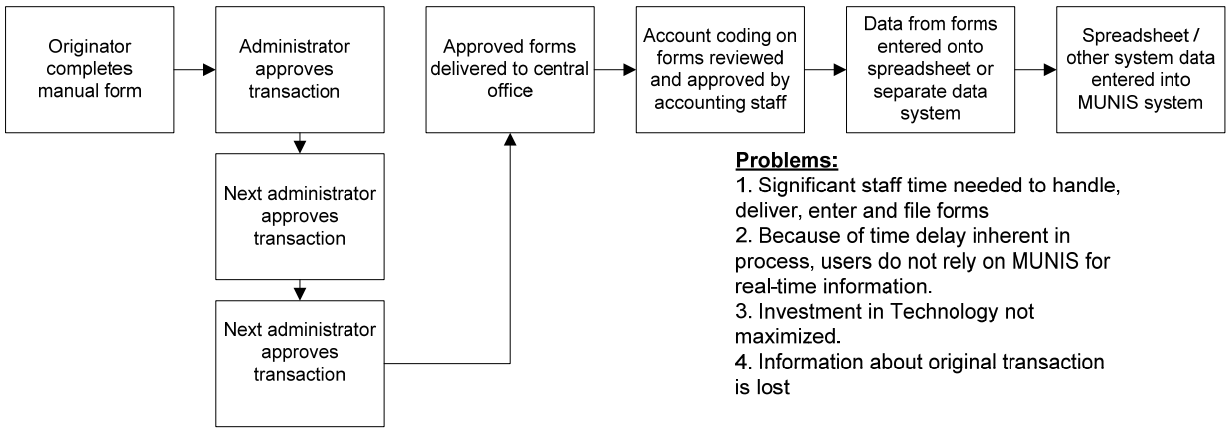
We learned that the implementation of MUNIS was undertaken without analysis of existing business processes, and how these processes should be conducted within the MUNIS environment. Workflow tools within MUNIS for automating and streamlining business processes have not been implemented. As a result, key benefits of an integrated system have not been achieved. We believe that opportunities to reduce clerical and administrative positions exist by implementing the MUNIS purchase requisition workflow tools and automating employee timesheets.

Payroll Processing

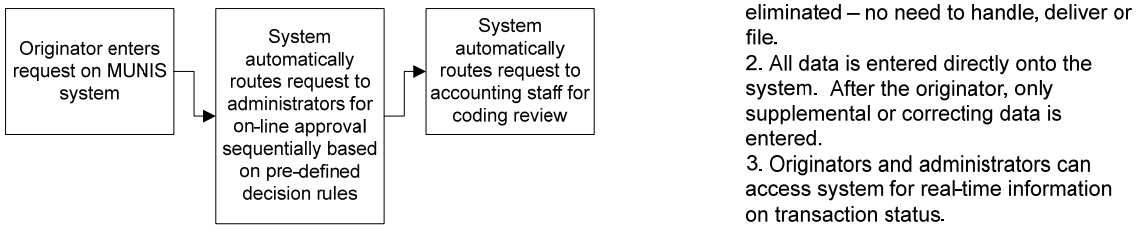
A significant portion of BPS payroll, including overtime, extra duty pay, stipends and substitute teacher compensation, requires the collection and processing of employee time records. Although most of BPS employees are paid on a salary basis, there are still thousands of such records processed each month. We observed that the payroll process still relies on hand-written timesheets or timecards completed by or for eligible employees. These time records are physically passed through various intermediate steps and are also transcribed to other electronic media, such as summary spreadsheets, before being entered into the MUNIS system.

A graphic depiction of the payroll and purchasing processes are shown in **Figure 1**.

Figure 1. Current Data Entry Process



Optimal Data Entry Process



We learned that, in most cases, time worked by security, custodial or other school-based personnel is recorded on paper time sheets and transcribed to other written records or summarized on spreadsheets or other electronic media before the data is entered into MUNIS. A DOS-based program that was written over 20 years ago is used to input the time of certain employees each pay period. Clerical staff in the Security Department, for example, take written time sheets completed by officers for overtime and key the records into this DOS system. Each pay period, personnel print out reports from the system which are then used by clerks in the Payroll Department to key into MUNIS. Much of the workload of the BPS Payroll Department involves the data entry of thousands of time records from timesheets, spreadsheets or reports generated from the legacy reporting system. Along the way, information regarding the date, time, and purpose of the hours worked is lost.

Currently, there are eight clerical staff (including one part-time clerk) in the Payroll and Federal and State Grants Departments whose primary responsibility is the processing of time records and data entry of time into MUNIS. The workload of these employees could be eliminated or significantly reduced by implementing automated timekeeping systems using inexpensive electronic time clocks or online

timekeeping software. Employees can easily be trained to record their time directly to these devices which can be either uploaded to MUNIS at the end of each time period or directly interfaced with MUNIS for real-time analysis.

Automated timekeeping systems are not only more convenient, but the records are more reliable and accurate. We were told, for example, that the time records for certain groups are always in whole numbers of hours. With automated timekeeping systems, BPS is responsible only for actual hours recorded by each employee. Also, the location, date, time and purpose of each time record can be retained for better management by supervisors (see ***Overtime*** section of this report above).

Based on our experience with other school systems, BPS could implement an automated timekeeping system before the start of the next fiscal year. Electronic time clocks can be purchased in bulk for approximately $600 each. BPS would require approximately 40 of these clocks for each school and other administrative locations. We have not priced online timekeeping systems, but $25,000 – $50,000 would not be considered an unreasonable amount for the initial licensing fee for a comparable online system.

Implementation of automated timekeeping would enable BPS to eliminate up to 7 positions in central office staffing dedicated to timesheet processing and MUNIS data entry. The workload of staff at each school (and the Facilities, Security, and Athletics offices) responsible for managing timesheets would also be reduced. The remaining two staff members in the Payroll Department would be responsible for monitoring the time clocks and collecting and uploading the data from each time clock to MUNIS for payroll processing. Estimated savings of approximately $300,000 would be achieved through implementation of an automated timekeeping system. An initialinvestment of $25,000 - $50,000 during the first year would be required for purchase of time clocks or similar online system licensing costs.

Other Payroll-Related Improvements

We noted that a relatively low percentage of BPS employees use direct or electronic deposit of paychecks. Currently, 25 percent of certified staff and 50 percent of non-certified staff still receive actual paychecks.

Many of our more progressive school system clients have adopted policies mandating automated electronic funds transfer for all payroll payments. The employee's first paycheck may be manual, after which all funds are deposited electronically. School systems have worked with local credit unions or banks to provide free checking for employees who receive EFT (electronic funds transfer) payroll checks.

Utilizing EFT methods and implementing Employee Self-Service modules can eliminate, or significantly reduce, the processing of actual paychecks and pay stubs. It can also reduce the number of W-2 statements distributed annually. No direct cost savings is estimated, but the workload for the Payroll Department can be futher reduced by implementing these features of MUNIS.

Discontinuing paper time forms and implementing Employee Self-Service will help reduce the level of inter-office mail at BPS.

Purchase Requisitions

Inefficiencies similar to those in the Payroll Department also exist in the procurement process (see ***Figure 1*** above). The City of Bridgeport Purchasing Department handles all purchasing for BPS. Purchase requisitions are created and approved within Bridgeport schools and departments and forwarded through the MUNIS system to the City of Bridgeport purchasing office.

Clerical staff at the schools or operating departments document their requests for materials, supplies or services using paper requisition forms. Requisitions are not standardized and differ by department and product or service type. These forms are manually routed and approved before being sent to either the BPS Business Office or the Federal and State Programs Office for entry into MUNIS. The Food and Nutrition Department manages its purchases independently.

The Business Office and Federal and State Grants office employ seven clerical staff and two supervisors whose primary responsibility is to code and approve purchase requisitions from the schools and operating departments. Similar to the process noted in the Payroll section of this report, requisitions are largely manual and duplicative. Requests for purchases are written by teachers or staff at the schools/departments and routed to various offices for review and approval. Only a few offices have direct access to the MUNIS purchasing module; therefore, requisitions are transcribed from paper form into MUNIS by staff in either the BPS Business or the Grants offices.

In general, invoices are mailed by vendors to the Business or Grants office for input to the financial system. Because the schools and departments are not interfacing directly in MUNIS, from a system standpoint, the Business and Grants offices function as both approver for both the purchase and the payment of goods and services. One must review the paperwork for purchases to determine which individual or department actually initiated each purchase.

The purchasing process is also complicated by the fact that a large percentage of requisitions are submitted “after the fact.” In other words, the goods or services have already been received or at least ordered, and the requisition is essenitally an authorization for payment, not purchase. In these cases, the time spent by clerical staff serves only to ensure the accurate coding of the expense, not the sourcing or authorization of the purchase.

The efficiency of the purchase requisition process could be improved by training school and department personnel to input requisitions directly into MUNIS and combining all departments that review and approve requistions under the Executive Director of Finance and Business Services Executive Director of Finance and Business Services. Utilizing the workflow tools in MUNIS, requisitions could route to the Technology Department or Federal and State Grants office supervisors for approval. Copies of catalogs, invoices, shipping documents and other information used in the approval of requisitions or payments can be attached in MUNIS as part of the workflow process. Re-engineering offers the following benefits:

- Better documentation within the system of the department or user actually initiating purchase requisitions.

- Reducing the flow of paperwork and inter-office mail.
- Eliminating the duplicate creation of a paper requisition and an electronic requistion in MUNIS.
- Streamlining the flow of requistions to ensure the approval by the Technology Department, Federal and State Grants office or other departments of purchased from certain sources of funds.
- Improved control over requistion routing and the timely creation and approval of purchase orders.
- Eliminating the need to route approved purchase orders back to the originator, because the originating department can review status and print approved purchase orders.
- Improved internal control by identifying in the system the user/department creating the requisition and the user/department approving the payment of the invoice.
- Enhancing the documentation of the three-way match of the purchase orders, invoice and receiving document/report in MUNIS, rather than in paper files.

We estimate that the consolidation and re-engineering of the purchasing and payment processes within MUNIS could enable BPS to eliminate or re-assign four (4) of the seven (7) clerical staff currently responsible for reviewing and entering payment requests. The resulting costs savings would be approximately $150,000 annually.

The supervisor for the Federal and State Grants office would serve as the primary accounting resource for federal and state grants accounts. His or her responsibilities would include reviewing and approving budget transfers and general financial reporting for federal and state grants.

To achieve savings in payroll and purchase requisition processes, BPS should conduct process re-engineering first, then identify additional software and hardware needs (such as the time system). The re-engineered processes will dictate new job descriptions and responsibilities, and require training of staff in the new procedures. BPS should dedicate a full-time position for one year to manage these changes, and outside assistance in performing the tasks may be needed.

In the following section, we recommend improvement of the overall **Purchasing** function at BPS. We believe that separating the sourcing and pricing functions of purchasing from the accounting compliance function will improve the value that BPS receives for its purchasing dollar and will enable the requisition review and approval function to operate more efficiently.

Purchasing

As we discussed in the above section, the City of Bridgeport Purchasing Department supports the BPS procurement process by approving requisitions and creating the related purchase orders (PO).

Purchasing within BPS consists only of the administrative process of creating, reviewing and approving requisitions, and none of the employees involved in the process are purchasing professionals. The City of Bridgeport's function in the process is only to ensure that requisitions comply with state purchasing laws with respect to thresholds for independent bidding or formal contracting and to monitor adherence to minority- and women-owned business purchasing directives.

BPS expended over $10 million from the general fund in 2009 for non-utility purchases of products and services. Major categories which individually represent more than 2 percent of total purchases (63.3% of total) are presented in **Table 11**.

Table 11. Purchasing Categories, Fiscal Year 2009, Bridgeport Public Schools

Category	Amount	Percentage of Total
Textbooks	$1,707,336	17.1%
Office Equipment	$1,386,266	13.9%
Other Services	$886,574	8.9%
School Supplies	$804,979	8.1%
Office Supplies	$549,312	5.5%
Legal Services	$527,754	5.3%
Cleaning Supplies	$442,603	4.4%
Other Maintenance and Repair	$381,182	3.8%
Total	**$6,686,007**	**63.3%**

Source: BPS Business Office.
Note: Excludes payments for utilities, insurance and workers compensation claims and other personnel-related.

BPS follows the City of Bridgeport's procurement policy which requires that all purchases over $1,000 be submitted for competitive quote; purchases over $7,500 require a formally documented bid. The Bid-Sync system is available to BPS staff involved in purchasing process. Bid-Sync provides a forum for buyers and sellers of products and services and helps to optimize the competitive bidding process. However, we learned that few BPS employees have been trained to use Bid-Sync and that fewer employees actually use the system.

Connecticut state purchasing regulations encourage competitive pricing for purchases when possible. Notices of competitive bidding for purchases over $50,000 must be advertised in local newspapers

waivers of competitive bidding are available in the case of nonrecurring and emergency purchases under $10,000[1].

The scope of our study did not include the detailed review of the categories of purchases. Where we noted significant variances in expenditures between fiscal years, such as for vehicle maintenance, we have indicated that elsewhere in this report. Without a formal purchasing function, BPS does not have any department charged with analyzing procurement trends and developing appropriate procurement strategies.

We also learned that purchase requests/POs are used for very small dollar purchases, including one recently for $0.35. Studies performed in the late 1990's when procurement card use proliferated, estimate that each PO-related transaction costs the institution up $75 in internal employee time. Transactions using procurement cards (P-cards) cost a fraction of that and free employees to perform more valuable tasks. P-cards present internal control challenges and require close monitoring to ensure that school resources are used wisely.

To improve purchasing effectiveness and efficiency, we recommend that BPS:

- Analyze purchasing trends for the most recent 12-24 months to stratify purchases by dollar amount, category, and vendor.
- Consider implementing a procurement card program to eliminate the use of purchase requisitions and POs for small dollar purchases. We recommend that BPS start with a maximum of $250-$500 for P-card transactions and increase the limit as schools and departments become more comfortable.
- Document purchasing methodologies for textbooks, office equipment and supplies, maintenance and other facilities supplies, custodial supplies and other large dollar categories.
- Negotiate long-term agreements with vendors representing the larger categories of spending to ensure optimum price and service levels.
- Train all purchasing and administrative staff with purchasing responsibility to use the Bid-Sync system when purchasing items not covered by vendor agreements.

The implementation of a procurement card system would significantly reduce the administrative time associated with purchase requisitions and POs. Use of P-cards would make implementation of our staff reduction recommendations noted above easier. Other benefits of a robust purchasing strategy are more difficult to calculate without detailed information of specific transactions. However, we believe that establishing a target of reductions in costs of 3 percent for FY 2010-11 is not an unreasonable goal. Achieving that level of savings would yield up to $300,000 of savings over 2010 levels.

[1]According to the Connecticut Department of Administrative Services statute, Chapter 58, section 4a-57, the threshold for waivers of competitive bidding was raised in 1999 from $1,000 to $10,000.

Bridgeport Public Schools Budgeting Process

During this efficiency study, we were able to observe portions of the BPS budgeting process. We also reviewed budget process documentation and interviewed staff involved in the budget development process.

Based on our assessment, we believe the BPS budgeting process needs to be fundamentally changed to: (1) be more transparent as to the justification for the expenditure, (2) more efficiently allocate resources based on measures of performance and efficiency, and (3) support the allocation of resources to BPS priorities established in the strategic plan.

Each year, public school systems are required to create a budget that must be adopted by its school board, and in Bridgeport, the Mayor. Most school systems, including Bridgeport Public Schools, develop a budget based on a "last year – this year – next year" model, meaning that they look at the prior years' expenditures as a base and increase or decrease the budget for the next year, focusing more on incremental changes from year-to-year. Those creating budgets tend to look at dollar amounts, some per student amounts, and some charted data. The format of a traditional budget is generally dictated by regulatory requirements.

This traditional approach is insufficient in several respects:

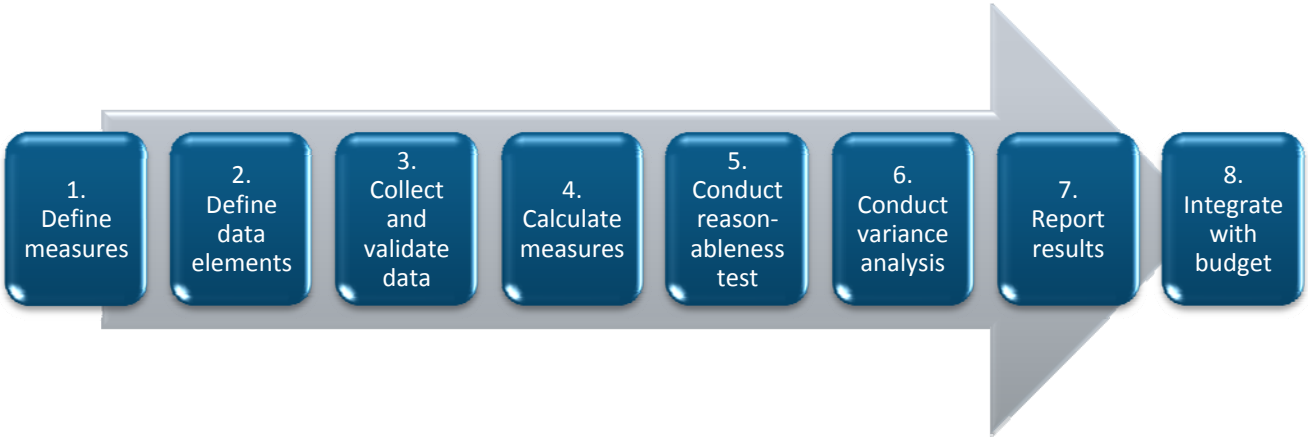
- Three years is not long enough to establish a trend. A meaningful trend requires at least five years of data.
- Viewing dollar amounts is not particularly informative as there is no contextual references such as measures of efficiency or effectiveness.
- It is often difficult to show the relationship between the budget and school system priorities or plans when utilizing a traditional budgeting approach.
- A traditional budget inappropriately assumes that the prior year budget was reasonable and then focuses only on incremental changes.
- While meeting regulatory requirements, the complex format of the budget generally does not meet the information requirements of Board members, superintendents or members of the community.

The concept of performance-based budgeting has been around since the 1970s but has been more popular in the private sector, only recently becoming more frequently used in state and local government. In perhaps an oversimplification, performance-based budgeting justifies spending levels by measuring the efficiency of resources.

Performance-based budgeting has rarely been used in public school systems, but its application works well, as school systems are moving toward increased transparency and fiscal accountability. For school systems, a focus on the efficiency of inputs and the effectiveness of outputs will result in a more meaningful budget and improved accountability for efficiency. Efficiency measures may include inputs such as staff counts and operating statistics (e.g., computers, kilowatt hours of electricity) while effectiveness of outputs may include response times, customer satisfaction, and meeting or exceeding established standards. *Appendix B* includes sample performance measures that BPS could draw from in developing its own performance-based budgeting approach.

There are eight major steps (see ***Figure 2***) involved in implementing performance-based budgeting:

Figure 2. Major Steps in Implementing Performance-Based Budgeting



1. Define Measures

This type of budgeting requires the definition of performance measures at the beginning of the process, as linking these performance measures to school system resources is the key to this approach. Both efficiency and effectiveness measures should be defined at this point. When creating efficiency measures the factors driving the level of cost should be identified, such as the number of meals served at a campus or the number of square feet each custodian cleans in a day. With effectiveness measures there may be data limitations, but analyzing the costs and benefits of tracking the information will help a system decide which measures should be used. It is important not to choose too many measures at the beginning – this may be too overwhelming for an organization to absorb at one time. It is best to phase more performance measures in over time. Examples of performance measures include pupil-staff ratios, gross square feet of space cleaned per FTE custodian, meals served per labor hour, kilowatt hour usage by square foot, number of workstations per help desk FTE, and transportation cost per mile. BPS has isolated instances of performance measure tracking, but efficiency measurement is not a system-wide practice and it is not incorporated into the budgeting process.

2. Define Data Elements

Each performance measure should have a specific definition – many of the data elements will not be subject to a state data standard or definition. Examples include gross square feet of space and the

number of computers in the school system. It is crucial to collect data at the same point in time every year and to base the data upon the same definition/source as the prior year in order to achieve consistent results. The source of data should be documented to aid in consistent collection in future years. A good practice is to time the collection of data based upon other data collection and cutoff dates.

3. Collect and Validate Data

In many school systems, data is generally stored in two places: (1) application systems, or (2) other automated or manual data systems, such as spreadsheets or database files. Once data has been collected, a central data repository is highly desirable to maximize data quality. This allows for control, efficiency and data integrity. All data collected should be independently validated by another unit in the school system. Independent validation of data is crucial as management should not build an accountability system based on inaccurate data.

4. Calculate Measures

There are three methods that school systems can generally use to calculate measures: (1) spreadsheets, (2) databases, and (3) data visualization tools. Utilizing spreadsheets is the easiest method for calculating measures as most users are familiar with inserting various formulas. Databases are more time consuming but more effective for analysis than spreadsheets. Data visualization tools are a relatively new way school systems are calculating measures and are far more powerful than conventional tools. Data visualization tools have measures built into the background of the system so users are able to dynamically view different data scenarios, stratifications, and levels of data.

5. Conduct Reasonableness Tests

Reasonableness testing is perhaps the most important step when defining new performance measures. The first question to ask in this stage is, “Do the measures make sense?” In the initial year, there will likely be data issues that need to be resolved. There may be multiple sources of the same data that are not consistent. In other cases certain types of data could have been erroneously omitted or added. Reasonable tests will need to be conducted annually to ensure that the measures are accurate and ready for analysis.

6. Conduct Variance Analysis

Tracking performance becomes more meaningful when lower level analysis is conducted to understand what the data is telling you. Five-year performance trends and comparisons to available benchmarks standards and best practices should be analyzed. It is important to research the causes of an unfavorable variance or trend instead of relying on probable explanations. This may require the analysis of additional data at a more granular level.

7. Report Results

In order to garner maximum buy-in for performance-based budgeting, it is important to report the results of the analysis. School Boards will typically be more receptive to budget increases or changes if the budget and performance measures are supported by performance analysis. Spreadsheet graphics with explanations may be the easiest way to accomplish this, but some of the more advanced reporting and analysis tools are much more powerful and easier to understand.

8. Integrate with the Budget

It is important to show at least a five-year performance trend in the budget for budget decision makers to be most informed. Any time frame less than five years can result in data outliers that can be attributed to an extenuating circumstance and is not indicative of a trend. When showing budget dollars, underlying staffing levels and performance trends should be shown as well. It is important to note productivity changes and other highlights of the variance analysis. As part of the budget process, out-year performance targets should be established and plans on how to meet them should be developed.

Appendix C of this report contains sample performance measures by functional area.

Additional Areas for Study

In addition to the opportunities for major cost savings discussed earlier in this report, we also noted several areas for additional research, investigation or investment. As noted above, our study concentrated on areas of savings that can be realized in the short term, and we did not perform extensive investigation of these other issues. They are presented for the consideration of the BRBC, BPS, and the City of Bridgeport to achieve further improvement in efficiency of operations of BPS.

These issues are presented in the following categories:

- BPS Organizational Structure
- School Staffing
- Technology Investments
- Facilities
- Employee Benefits
- Stockroom
- Legal Fees
- Grants Development

BPS Organizational Structure

The BPS central office organization structure has been changed over the years primarily because of budget reductions and elimination of central office positions. As a result, the organization structure has several characteristics that are limiting effective accountability in the organization. Two examples noted during this high-level efficiency study are elementary school management and technology management.

BPS Pre-K through 8 schools report to one of four different leadership positions. In addition, there is an assistant superintendent that oversees secondary and alternative schools. The four positions with responsibility for elementary schools are:

1. Chief of Staff and Operations
2. Assistant Superintendent of Youth Development
3. Assistant Superintendent of Elementary Schools
4. Executive Director of Learning and Teaching

This structure disperses accountability for elementary school performance and limits the ability to maximize coordinated support efforts. BPS should consider consolidating elementary schools under a single leadership position that is adequately supported with lower level staff.

Technology functions at BPS also report to various leadership positions within the school system. At the executive level, three (3) management positions have direct technology reports in the areas of student

information, educational technology, and information technology. The reporting relationships are as follows:

- Executive Director of Finance and Business Services
  - System Application Developer (1 position)
  - Director of Information Technology (department)
  - System Application Coordinator (1 position)
- Assistant Superintendent of Youth Development
  - Student Information System implementation (1 position)
- Executive Director of Learning and Teaching
  - Director of Educational Technology (department)

Similar to elementary schools, the dispersion of technology functions across the school system may be limiting the effectiveness and efficiency of the technology function. By establishing a single organizational unit for technology, accountability and the coordination of technology services could be enhanced. BPS should also consider having technology as a direct report to the Chief of Staff, to reflect its increased importance in the school system and to organizationally reflect a unit independent of the functions it supports.

BPS, either through Phase IV of the BRBC work or on its own, should conduct a more thorough organizational analysis to ensure that functions are logically aligned to support effective accountability, and that spans of control (the number of direct reports to a supervisory position) are reasonable. A re-organization may not necessarily result in an increase or decrease in the number of management positions, but will provide a structure that better supports effective management and accountability. Any major organization structure changes should be implemented after other staffing changes are made through process re-engineering, system maximization, and other cost savings measures contained in this report.

School Staffing

BPS schools have more non-teaching staff dedicated to social services, special education, security and other student support services than most urban school systems. In some schools, teachers represent only one-third of the positions. Brideport Public Schools has a high percentage of economically disadvantaged students with unique needs. Before any judgment regarding staff levels can be made, a more thorough analyses of these needs and related staff caseloads should be conducted.

BPS schools have lower clerical staff levels than most urban schools. As a result of cost-cutting efforts, clerical staff have been reduced to such low levels that professional staff, including teachers, are now required to perform clerical tasks at the schools. This is not an effective use of professional staff time. As processes are redefined at the schools based on separate recommendations in this report, the work

demands of clerical staff should be analyzed and quanitifed, and clerical work demands should be matched to appropriate clerical or support positions. This may result in freeing up teacher and other professional time for teaching or other more technically demanding responsibilities.

Technology

Technology is an area in BPS needing additional investments in three major areas: (1) implementation of project management for new application software, (2) new computers, and (3) additional technology support staff.

In implementing the MUNIS finance and human resource/payroll systems, the City of Bridgeport contracted with an outside consultant to assist with installation and configuration, data conversion, and user training, among other activities. It is the responsibility of BPS, however, to re-engineer its processes and ensure that all system features purchased are properly utilized. BPS has been unable to dedicate the necessary technical, functional, and project management resources to fully implement the MUNIS system and achieve its full benefits. During our work at BPS, we were unable to obtain a financial statement for any month during the 2009-10 fiscal year, nor were we able to obtain a list of BPS positions (filled and unfilled) that are in the budget. The goal of transparency and efficiency cannot be fulfilled until BPS successfully implements these systems and generates meaningful and accurate information.

BPS is also implementing two other major application systems for student information management (PowerSchool) and transportation (Transfinder). The the maintenance work order system already in place (SchoolDude) is significantly underutilized. BPS would also greatly benefit from the implementation of an automated timeclock system and a digital imaging system to further streamline processes and eliminate paperwork.

To successfully implement application software, additional temporary staff resources are needed to ensure that all functions of application software are implemented, that processes are re-engineered around this software to maximize efficiency, and that staff are fully trained on new operating procedures.

The average age of a personal computer at BPS is eight years. Most school systems have a replacement program whereby computers are replaced no less than every five years and for certain computers every three years. Outdated computers cannot sufficiently support current operating systems and application software, and are expensive to maintain. Slow response times and system downtime may be due more to the computer at an employee's or student's desk than the district level information systems and software. While BPS has committed resources for purchasing new computers, a computer replacement program should be developed to ensure that purchased software for instructional and administrative purposes can be effectively used.

Support staff for techology maintenance is much lower than industry standards at BPS. Private sector staff ratios are 350 computers per support staff; public schools generally apply a 500 to 1 ratio; BPS'

ratio is over 800 to 1. Combined with the outdated computers, this staff level cannot be expected to provide adequate and timely support for the school system's technology needs. A computer replacement program described above will help reduce the demands for computer maintenance, but additional full-time staff will be needed to provide effective and responsive support.

BPS should redirect a portion of the savings achieved through other recommendations contained in this report to these three areas.

Facilities

During our review of facilities and recent planning efforts, we identified a number of issues that need additional research and consideration. As a result, BPS should:

1. Undertake an energy reduction program to include return-on-investment calculation for electricity, gas, oil and water consumption. The program considers opportunities for long-term energy cost reductions and identifies available sources of investments from grants, federal funds, utility rebates and state reimbursements. According to the Facilities Department approximately 20-30 percent of existing older BPS facilities have been retrofitted with energy-saving lighting. BPS should also consider partnering with energy service companies to accelerate energy reduction efforts.

2. Perform a detailed capacity analysis for all schools and update all school floor plans. BPS should determine the current capacity shortfalls and opportunities with the aim of eliminating any under-utilized capacity that exists currently. We recommend defering any major new construction or renovation until the capacity analysis is completed.

3. Evaluate the condition of the maintenance vehicle fleet. The current BPS maintenance fleet includes 41 vehicles with average age of 10 years. BPS fleet is very old and many vehicles are inoperable. Vehicle maintenance expenditures increased from $132,000 in 2008 to $303,000 in 2009 (55 percent increase). Some employees are encouraged to use their personal vehicle, because BPS vehicles are not available. Maintenance costs and gas allowances (for employees using personal vehicles) could be reduced by updating fleet age.

4. Develop a comprehensive preventative maintenance program to extend the life of existing building systems and reduce major repairs and replacements of equipment.

5. Evaluate the needs for leases of facilities. The Parent Center, the adult education facility, a gymnasium, and a parking garage are currently leased by BPS. Better value might be available by re-locating the activities in these facilities at permanent locations in conjunction with Item nunber 2 listed above.

6. Implement a vandalism reduction program to reduce the estimated $700,000 of costs associated with over 600 vandalism-related work orders.

7. Consider contracting with an external vendor to provide technical and operations expertise in preventative maintenance, training, safety, equipment and supplies purchasing and warehousing and vehicle management.

8. Consider opportunities to reduce employee costs through the investment in labor-saving equipment.

Stockroom

The BPS Stockroom is located in the building which also houses the Facilities' garage and storeroom. Staffed with a supervisor and three warehousemen/drivers, the Stockroom serves four primary purposes:

1. *School Start-up* – The Stockroom handles the large volume of educational materials, supplies, equipment and furniture ordered by schools in the summer for the next school year. It serves as the staging area for deliveries and drivers handle the distribution of materials and equipment to each school.

2. *Office Supplies Inventory Management* – The Stockroom stocks a variety of items including paper, pens, pencils and other standard office products.

3. *Inter-school Mail* – The Stockroom collects written communications between and among central BPS administration and schools, as well as the flow of paper related to financial transactions (payroll, purchase requests, etc.) and distributes information to each school 3 times weekly. Information flow includes parent/teacher materials, superintendent newsletters, materials produced at local print shops (for example, report cards), testing materials, and other district-wide communications.

4. *Odd Jobs* – The Stockroom drivers handle odd jobs at schools such as moving furniture.

Stockroom staffing levels have been cut in recent years. Last year, four positions were eliminated: one driver and one clerical position were permanently eliminated; one driver was transferred to Nutrition, and one driver moved to the Science Life Skills department (within the Learning and Teaching division). Further reductions in the volume of materials handled by the Stockroom drivers would free resources for other tasks.

Inter-office Mail – The implementation of purchasing workflow tools in MUNIS and automated timekeeping systems will significantly reduce the volume of paper moving between the schools to central BPS offices. Remaining communications could be handled by fewer drivers.

Office Supplies – The office products handled by the Stockroom are standard items carried by any office products vendor. More efficient delivery of items could be achieved by direct shipping of items from vendor to school. Many districts have automated the office products ordering and delivery process by selecting one vendor and developing online ordering tools for school administrative staff. The process

ensures that standard pricing is obtained and service-level standards are maintained. Information regarding account coding can be automatically uploaded to the MUNIS system to further reduce the time required for data entry.

Bank Runs – We also learned that Stockroom drivers are tasked with depositing cash and checks from schools to local banks. We did not determine the source of these deposits, but having non-bonded employees handling cash is an unnecessary risk. The source and nature of these funds should be analyzed, and, if warranted, BPS should contract with a bonded courier service to make these deliveries.

Legal Fees

BPS is in the process of evaluating the costs associated with legal services in an effort to better understand the causes for recent increases. Based on discussions with BPS administration and one Board member about legal fee concerns, we believe BPS should address the following questions in analyzing its legal fee expenditures:

- What are the legal obligations of the City of Bridgeport attorney to represent BPS, and can BPS have a separate position for general counsel to support its own needs?
- What is the current distribution of the City of Bridgeport and outside legal fees by type of service, such as labor law, construction, other contracts, special education, insurance and other major categories?
- What criteria is used to determine when outside counsel is used, and who is accountable for managing the efforts and costs associated with the use of outside firms?
- How are BPS risks being managed to minimize legal fees and litigation? Who within BPS is responsible for the various types of risk management?

Grants Development

BPS should hire a grant developer to oversee the development and writing of grant applications for the school system. Responsibilities would include identifying opportunities for additional public and private grants and working with the appropriate BPS department to develop grant proposals. A full-time position for overseeing grant development would be at a minimum cost neutral and would likely be able to develop new sources of revenues to enhance existing programs or fund new educational initiatives.

Appendix A
Project Interviewees

The following were interviewed as part of this efficiency study:

- Paul Timpanelli, President, Bridgeport Regional Business Council
- Barbara Edinburg, Executive Director, Bridgeport Child Advocacy Coalition
- Robert Henry, Chief of Staff and Operations, Bridgeport Public Schools
- Julio Molleda, Executive Director of Finance and Business Services, Bridgeport Public Schools
- Bob Francis, Executive Director RYASAP (Regional Youth Adult Substance Abuse Project), Member of Education Work Council
- Gus Serra, Member, Education Work Council
- Gary Peluchette, President, Bridgeport Education Association
- Jennifer Silves, Field Representative, Connecticut Education Association
- Mike Feeney, Chief Financial Officer, City of Bridgeport
- Bill Finch, Mayor, Bridgeport
- Andrew Nunn, Chief Administrative Officer, City of Bridgeport
- Dr. John Ramos, Superintendent, Bridgeport Public Schools
- Tom McCarthy, President, Bridgeport City Council
- Barbara Bellinger, Chair, Board of Education
- Marge Hiller, Bridgeport Public Education Fund
- Tom Sherwood, Office of Policy and Management, City of Bridgeport
- Susan Davis, Chairman of the Board, Bridgeport Regional Business Council
- Chuck Firlotte, former Chairman of the Board, Bridgeport Regional Business Council
- Cynthia Fernandes, Executive Director of Learning and Teaching, Bridgeport Public Schools
- Teresa Carroll, Assistant Superintendent of Elementary Schools, Bridgeport Public Schools
- Giovanna DeNitto, Principal, Madison School, Bridgeport Public Schools
- Denise Clemons, Assistant Superintendent of Secondary Schools, Bridgeport Public Schools
- Jorge Garcia, Executive Director of Operations, Bridgeport Public Schools
- David Dunn, Human Resources, City of Bridgeport
- Michael Zirkel, Operations Manager, Bridgeport Public Schools
- Ray Wiley, Construction Contractor, City of Bridgeport
- Liz Mauer, Manager of Budget and Financial Reporting, Bridgeport Public Schools
- James Adams, Principal, Longfellow School, Bridgeport Public Schools
- Hector Sanchez, Principal, Batalla School, Bridgeport Public Schools
- Michael Lombardi, Supervisor of Accounting and Procurement, Bridgeport Public Schools
- Christine Walsh-Mitchell, Supervisor of Payroll and Benefits, Bridgeport Public Schools
- Lisa Jones, Director of Public and Private Grants, Bridgeport Public Schools
- Bernd Tardy, Purchasing, City of Bridgeport

- Adam Heller, Information Technology Services, City of Bridgeport
- Carol Birks, Principal, Harding School, Bridgeport Public Schools
- Melvin Wearing, Director of Security, Bridgeport Public Schools
- Carole Pannozzo, Executive Director of Human Resources, Bridgeport Public Schools
- John Di Donato, Assistant Superintendent of Youth Development, Bridgeport Public Schools
- Maura O'Malley, Director of Food and Nutrition, Bridgeport Public Schools
- Maria Pereira, Member, Bridgeport Board of Education
- Al Heinlein, Stockroom Manager, Bridgeport Public Schools
- Andrea Broderick, Chief Accountant Federal and State Programs, Bridgeport Public Schools

Appendix B
Current Custodial Staffing Levels

School/Facility	Grades	Sq.Ft.	Classrooms	Enrollment	Portables	Custodians
Adult Education (Learning Enrichment)	Adult	40,440				1
Aquaculture	9-12	38,370	16	369		1
Barnum/Waltersville School [1]	PreK-8	176,832	21	609		10
Bassick	9-12	253,136	48	1,265		11.5
Cesar A. Batalla	PreK-8	146,000	-	1,102		10
Beardsley	K-6	70,553	22	396		4
Blackham	PreK-8	140,000	62	1,065	2	7
Black Rock	K-6	45,038	19	237		3
Bridgeport Learning Center (Sheridan)		43,357	9	42		1.5
Bryant School	K-5	50,000	20	429		4
Central	9-12	279,660	114	2,273		14
Classical Studies (Maplewood)		39,835	22	344		4
Columbus	PreK-8	85,814	44	635		5.5
Cross	K-8	66,415	27	380		4.5
Curiale	K-8	76,531	40	550	2	4
Dunbar	K-8	70,934	42	386	2	5
Edison	PreK-8	51,263	17	313	1	2
Hall	K-6	39,114	13	267	1	2
Hallen	K-6	47,998	21	354		3.5
Warren Harding	9-12	251,600		1,666		11
Hooker	K-8	62,172	21	466		6
JFK Campus [2]		155,377				9.5
Geraldine W. Johnson	PreK-8	105,000		778		5
Longfellow	PreK-8	81,228	47	414		5
Madison	K-6	60,964	21	530		3
Luis Munoz Marin	PreK-8	104,100	38	846	2	6
Parent Center		7,000				0
Park City (Magnet)	PreK-8	54,099	28	500	2	3
Read	K-8	83,405	37	926		7
Roosevelt	PreK-8	98,324	58	561	2	7
Skane Center		27,287	12	219	2	1.5
South End/Swing Column	PreK-8	115,640				
Jettie S. Tisdale	PreK-8	105,000		599		5
Whittier [3]		41,921	18	45		1
Winthrop School	K-8	89,508	43	728	3	6
Administrative Building [4]	N/A	36,500	N/A	N/A		2
City Hall	N/A		N/A	N/A		
City Hall Annex	N/A		N/A	N/A		
Maintenance Garage	N/A	30,000	N/A	N/A		
Stockroom	N/A	-	N/A	N/A		
Nutrition Center [5]	N/A	38,280				
Total		**3,544,148**	**880**	**19,294**	**19**	**175.5**

Appendix C
Sample Operational Performance Measures

Performance Measure	Level	Explanation
General District Management		
Ratio of students (enrollment) to Full-Time-Equivalent (FTE) employees	District	
Ratio of students (enrollment) to non-teaching FTE employees	District	
Central administration and instructional leadership expenditures (general fund) per pupil	District	
Central administration and instructional leadership expenditures (general fund), as a percentage of total expenditures	District	
General fund balance as a percent of target fund balance	District	
Percentage of students economically disadvantaged, mapped against the percentage of total revenue supported by federal funds	District	
School Management		
Pupil-teacher ratio, by school	Campus	
Pupil-aide ratio, by school	Campus	
Special education student population as a percent of total enrollment	District	
Percentage of schools meeting staffing standards for Principals, Assistant principals, Counselors, library/media specialists	Campus	
Average teacher class load per term by secondary schools	Campus	
Number of secondary class periods with < 5 students enrolled by school	Secondary Campus	
Number of secondary class periods with < 10 students enrolled by school	Secondary Campus	
Finance		
Number of total employees per finance department employee	District	To track the efficiency of the finance department.
Number of invoices and direct payments made per accounts payable personnel (FTE)	District	
Number of AP checks processed per AP department FTE	District	To track the efficiency of the accounts payable department.
Average age of Accounts Payable	District	
Number of Accounts Payable check voids and reissues	District	
Number of purchase orders processed per purchasing FTE	District	To track the efficiency of the purchasing department.
Average dollar value of purchase orders processed	District	
Number of payroll checks processed per number of payroll FTE	District	To track the efficiency of the payroll department.
Number of payroll check/advice voids and reissues	District	

Performance Measure	Level	Explanation
Human Resources and Benefits		
Number of district employees per FTE human resources employee	District	To track the efficiency of the HR department.
Number of employment applications processed	District	To measure efficiency of staffing, as new processes and technologies are implemented.
Average days from position vacancy to recommendation by hiring manager	District	To measure efficiency of job posting and candidate selection
Average days from recommendation by hiring manager to start date	District	To measure efficiency of "on boarding" process from when an employee is selected to when they begin work.
Non-certified teachers as a percentage of total teachers	District	NCLB-related measure
Total overtime cost	District	To determine if adding additional staff would be cheaper.
Turnover rate for teachers	District	
New teacher turnover rate (one year or less)	District	To determine if turnover is primarily new teachers - could prompt changes in "on boarding" or mentoring.
Turnover rate for non-teachers	District	
Low income/high minority campuses compared to teachers experience	Campus	To determine whether new teachers are being concentrated in low income/high minority campuses
Percentage of teachers by ethnicity, compared to percentage of students by ethnicity	Campus	To see if ethnicity percentages of teachers are similar to students
Teacher absentee days per year by campus	Campus	
Substitute costs per year per campus	Campus	
Benefits cost as a percentage of total salaries and wages	District	

Performance Measure	Level	Explanation
Technology		
Students (enrollment) per instructional computer (in classrooms and labs, plus laptops)	District	
Average age of PCs	District	
Average age of Apple computers	District	
Number of computers per maintenance, repair, installation FTEs	District	
Ratio of total students to total technology staff	District	
Ratio of total students to total instructional technology staff (including campus liaisons)	District	
Ratio of total employees to total technology staff	District	
Ratio of total employees to technical support staff	District	
Ratio of total computers to technical support staff	District	
Ratio of instructional computers to instructional technology staff	District	
Average turnaround time for computer work orders (days)	District	
Facilities		
Average annual salary of skilled trades/maintenance FTE	District	
Maintenance expenditures per gross square foot (Including portables)	District	
Maintenance expenditures as a percent of total expenditures	District	
Total maintenance expenditures per student	District	
Gross square feet per maintenance FTE	District	
Average turnaround time (days) for maintenance work orders to be closed	District	
Percentage of work orders that were preventative	District	
Average salary of all building and grounds FTE	District	
Average annual salary of custodial FTE	District	
Custodial salaries per gross square foot (Including portables)	District	
Gross square feet per FTE custodian	District	
Acres per grounds FTE	District	
Facility capacity (permanent only) versus occupancy by school (TEA standards for capacity, room size)	Campus	
Facility capacity (all inl. Portables) versus occupancy by school (TEA standards for capacity, room size)	Campus	
Percentage of square footage that is portable classrooms	Campus	To show how much portable sq footage the district has
Percentage of district portable classrooms by school	Campus	To show where portables are concentrated
Electricity cost (kwh) per square foot	Campus	
Water cost (kgal) per square foot	Campus	
Natural gas cost (ccf) per square foot	Campus	

Performance Measure	Level	Explanation
Nutrition		
Meals Per Labor Hour (MPLH), By School	Campus	
Participation Rates (Bfast/Lunch), By School:	Campus	
Free (Percentage Participating)	Campus	
Reduced Price (Percentage Participating)	Campus	
Paid (Number of Paid Meals Per Year)	Campus	
Free and Reduced Price Bfast / Lunch participating versus eligible	Campus	
Net Profit (Loss) of Food Services Operation	District	
Net Profit (Loss), By School	Campus	
Indirect costs allocated to food service (amount and type)(from gen. fund only)	District	
Cash in lieu of commodities	District	
Food cost as a percent of total cost	Both	
Schools Only	Campus	
All District Facilities	District	
Transportation		
Total cost per mile driven	District	To measure cost of transportation program
Total cost per average daily rider	District	To measure cost of transportation program
Average fuel cost per gallon (gasoline and diesel)	District	
Annual transportation cost per student rider	District	
Annual maintenance cost per bus	District	
Accidents every 100,000 miles of service	District	
Student incidents every 1,000 students transported	District	
Maximum length of student time on school bus (minute)	District	
Annual turnover rate for bus drivers	District	
Annual turnover rate for bus monitors	District	