



To: Mr. Bill Stone
Assistant Superintendent
Keller ISD

From: Philip "Red" Whiddon
Principal
THE SCHOOL BUSINESS GROUP

Date: September 20, 2005

Subject: Comprehensive Review

This overview summarizes my understanding of the objectives that you would like to see addressed for the comprehensive review of the Maintenance and Operations Departments. Also, it will describe the procedures, approach, objective, and scope associated with this review.

PROCEDURES

- ◆ Provide self-evaluation forms to be completed by each department
 - ◆ Personnel
 - ◆ Facilities--square footage, usage and future options
 - ◆ Existing organization and future options
 - ◆ Special areas of review

- ◆ Perform personnel assessment of specific groups
 - ◆ Administrators
 - ◆ Managers / Supervisors
 - ◆ Foremen / Lead-people
 - ◆ Workers by craft

- ◆ Review division of job duties and job descriptions

- ◆ Review and study the self-evaluation reports, manuals and other data

- ◆ Have in depth discussions with the staff of each department

- ◆ Observe daily ongoing activities

- ◆ Interview staff and management

- ◆ Study and compare departmental usage with local and national standards



- ◆ Meet with management and discuss options and format for report
- ◆ Deliver rough draft of report for discussion
 - ◆ Commendations
 - ◆ Areas in need of improvement
 - ◆ Recommendations
 - ◆ Summary
- ◆ Deliver final draft of report with summaries by department and specific recommendations and associated timelines to you with expected costs
- ◆ Discuss options for now and for the next three to five years

APPROACH

In order to accomplish the objectives of the proposed review, the following activities will take place on site after the self-evaluations are analyzed:

1. A meeting will be held with the supervisors of the all departments. The purpose of the meeting will be to emphasize that this project will be an evaluation of personnel utilization and will include everyday operations. Employees must feel secure and recognize the benefits of this study.
2. As a means of enhancing our familiarity and understanding of current operations, we will review all associated areas.
3. Interviews will be conducted.
4. Procedures and processes will be analyzed.
5. Internal management controls will be reviewed to identify areas within the departments where opportunities for enhanced managerial control would be appropriate.
6. An exit interview will be held that will briefly summarize the findings with your management team, discussions held and information shared.

A final written report and electronic presentation will be prepared documenting the findings and recommendations.

OBJECTIVES

1. Provide recommendations for improvements with facility reengineering opportunities, in current practices, functional roles, departmental functions, responsibilities and work flow processing to include internal controls.



2. Provide specific opportunities, to improve ongoing processes.
3. Recommend long-term solutions for space and facility needs.

SCOPE

The scope of this study will help examine the following organizational elements and activities as each pertains to the departments:

1. Internal controls
 - A. Rules and Regulations
 1. Definitions
 2. Communications
 3. Expectations
 4. Review processes
 - B. Personnel Policies
 1. Specific and written
 2. Analyzed regularly
 3. Corrected
 4. Evaluation instruments
2. Economy and efficiency of the departments
 - A. Staggered hour assignments
 - B. Seasonal responsibilities
 - C. Dual use of personnel
 - D. Custodial/cleaning responsibilities
 - E. Night crew
 - F. Building/district assignments
 - G. Team/ individual concepts
 - H. Cross training
 - I. Teaming and committee concepts
 - J. Shared supervision
 - K. Equipment/vehicle utilization
3. Personnel utilization
 - A. Workload balancing/sharing
 - B. Frequency of need (temporary/seasonal)
 - C. Capabilities of staff
 - D. Evaluation of supervision
 - E. Departmental cost analysis
 - F. Supervisory responsibilities
 - G. Clerical/input personnel utilization



4. Physical space requirements for the Maintenance and Operations Departments
 - A. How much space
 - B. Type of space
 - C. Configuration of space
 - D. Utilization of space
 - E. Shared space
 - F. Prioritizing of space

5. Record keeping practices
 - A. Time accountability and productivity
 - B. Purchase order accountability
 - C. Repair request accountability
 - D. Filing procedures
 - E. Personnel records
 - F. Training records
 - G. Safety and security accountability and records
 - H. State and Federal mandate accountability and records

6. Interdepartmental coordination and information exchange
 - A. General organization of institution and departments
 - B. Supervisory/administrative reporting relationships
 - C. Worker reporting relationships
 - D. Definition of functional roles
 - E. Personnel information exchange
 - F. Shared staffing procedures
 - G. Project coordination and follow-up

JOINT PARTICIPATION

Our experience has shown that one of the most important contributing factors to a successful assignment of this type is active participation by district personnel. As you can appreciate, an attempt to minimize interference and access to the district's personnel is critical. We recommend that the heads of the departments assist us in scheduling interviews and meetings with the personnel of these departments.

BENEFITS

This study will allow the management and staff the opportunity to give input into the reengineering of their departments, the efficient utilization of funds and the additional prospect of sharing staff and resources.

This Comprehensive Review will help your educational institution become a safe, attractive, comfortable, clean and efficient place to teach children. The auxiliary personnel will be proud of what they do each day in their efforts to provide facilities and services for the education of the children of Keller ISD.



Included in project:

- A comprehensive review of the before mentioned departments – Copies of evaluation forms provided by us to the district personnel
- A Customer Satisfaction Survey – Copies of survey instruments provided by us to the district's customers
- 2 - Three ring review binders with information and pictures
- 1 - Electronic copy of a presentation for your use at meetings
- All expenses included
- Approximate time for completion – 180 days

Cost of Comprehensive Review Proposal

\$ 80,000.00

BILLING

The District will be billed 30% of the contract amount after the evaluation instruments have been given to your auxiliary personnel. The second 30% will be billed after the evaluation instruments have been returned to us and the interviews have been completed. The third 30% will be billed after the information has been compiled, a rough draft completed and discussed with you. The final 10% will be billed after the final copies have been received by the District, along with your electronic presentation.

Thank you for your valuable time and we are pleased to serve you.

Philip "Red" Whiddon

Authority to proceed:

Purchase Order # _____

Bill Stone

Date