

BALTIMORE CITY PUBLIC SCHOOLS

Catherine E. Pugh
Mayor, City of Baltimore

Cheryl A. Casciani
Chair, Baltimore City Board of
School Commissioners

Dr. Sonja Brookins Santelises
Chief Executive Officer

*MSAR #11166 – SB 1024/Ch. 607((4)(d)), 2017 and HB 684/Ch. 6((4)(d)), 2017 – and –
MSAR # 11180 – HB 152/Ch. 23, Sec. 17, 2017*

City Schools Financial Recovery Plan – Quarterly Progress Report May 1, 2019

- 1. Monthly financial reports, winter/spring forecasts, EOY closeouts, subsequent budget**
 - Please see attachments.
- 2. District will evaluate if schools are meeting needs of students, subsequent actions – grade configurations, programming, school mergers/closings**

Meeting Student Need

Q1 – FY18

- Principal Supervisors (Instruction and Learning Executive Directors - ILEDs) regularly review the progress of individual schools both from a quantitative and a qualitative basis. This is done in coordination with district instructional support staff and the school leadership team. This review, which occurs at least once per month, usually involves a walkthrough of the school with an analysis of student outcomes. Actions and next steps are planned so that particular areas of need – classrooms, grades, subjects, teachers, climate, curriculum, particular students, etc. – are addressed. This ongoing feedback between the ILED and the principal with their team forms the basis of day-to-day school evaluation and subsequent actions.

Q2 – FY18

- During the second quarter of the 2017-2018 school year, there was an emphasis on math progress exhibited through ANET assessments (review and instructional changes) along with preparation for an increased literacy emphasis via our districtwide Blueprint implementation strategy.

Q3 – FY18

- During the third quarter of the 2017-2018 school year, ILEDs worked with schools to make plans for the 2018-19 school year. This was achieved through strategic planning, a general assessment of the current programming and alignment of district priorities, schools needs and each school's budget. Additionally, the schools office continue to monitor school-level progress through both qualitative and quantitative measures.

Q4 – FY18

- During the fourth quarter of the 2017-2018 school year, ILEDs continued to work with schools to make plans for the 2018-19 school year. Planning was executed at the CAO/CoSch Institute, where CLNs spent two days focused on academic planning. Additionally, there has been an emphasis on leadership staffing, ensuring that students will have the highest quality principal leaders. The schools office continues to monitor school-level progress through both qualitative and quantitative measures.

Q1 – FY19

- As indicated previously, during the first quarter of each year, Principal Supervisors (Instruction and Learning Executive Directors - ILEDs) regularly review the progress of individual schools both from a quantitative and a qualitative basis. This is done in coordination with district instructional support staff and the school leadership team. This review, which occurs at least once per month, usually involves a walkthrough of the school with an analysis of student outcomes. Actions and next steps are planned so that particular areas of need – classrooms, grades, subjects, teachers, climate, curriculum, particular students, etc. – are addressed. This ongoing feedback between the ILED and the principal with their team forms the basis of day-to-day school evaluation and subsequent actions.

Q2 – FY19

- Principal Supervisors (Instruction and Learning Executive Directors - ILEDs) continue to regularly review the progress of individual schools both from a quantitative and a qualitative basis. The ILEDs are working with school leaders to emphasize the districts new curriculum, Wit and Wisdom, monitoring the pacing of teachers and ensuring that high-quality questions are being asked. Additionally, to ensure that principals and ILEDs are aligned in their goals, this year, ILEDs along with the Chief of Schools met with all principals to individually to review school progress and set goals around their literacy and math growth.

Q3 – FY19

- Principal Supervisors (Instruction and Learning Executive Directors - ILEDs) continue to monitor the progress of schools and ensure that they are working towards the goals set at the beginning of the year. ILEDs have been participating in norming walks, which are lesson observations where teams of ILEDs and principals view instruction to norm on what went well in a lesson and what needs to be improved on, for the Wit and Wisdom curriculum so that schools are normed in how they are delivering the curriculum. This practice has improved implementation of the Wit and Wisdom content, which should improve ELA results on any end-of-year exams.

Grade Configurations, Programming, School Mergers/Closings

Q1 – FY18

On an annual basis, City Schools conducts a review of its school programs and facilities as part of the portfolio review process. This review considers a range of factors, such as academic performance, climate, quality and distribution of school programming, school enrollment and size, building utilization and condition, school locations and geographic distribution of schools and programs, schools scheduled for closure per the 21st Century Buildings Plan, and the renewal framework for operator-run schools. For 2017-18, the portfolio and renewal process is currently underway, with the portfolio recommendations

for the current year scheduled for presentation to the School Board on November 14, 2017. After opportunities for community feedback through school-based and central meetings, the School Board will vote on the recommendations on December 19, 2017. We will provide an update on the status of the annual portfolio recommendations and actions in the next quarterly report.

Q2 – FY18

- In this year's portfolio review, five schools were approved for closure in the summer of 2018: Coldstream Park Elementary/Middle School, Dr. Carter G. Woodson Elementary/Middle School, Friendship Academy of Engineering and Technology (FAET), Knowledge and Success Academy (KASA), and Rognel Heights Elementary/Middle School. The buildings of Patapsco, Rognel Heights, and Westside will be surplus in summer 2018, with Dr. Carter G. Woodson being surplus in 2020 and the Northwestern building in 2021.
- Two schools were approved for relocation: Bluford Drew Jemison STEM Academy West, to be collocated to the Harlem Park building, and the Stadium School, to be relocated to the Coldstream building. Two schools were approved for grade reconfigurations in October 2017: Calverton Elementary/Middle School, to become a grade 3-8 school, and James Mosher Elementary, to become a grade pre-k -2 school, both to become effective when their 21st century buildings are complete. In December, two other grade reconfigurations were approved: Arlington Elementary/Middle School will retain grades 6-8 until the end of the 2018-19 school year, and New Era Academy will become a grades 9-12 school in 2018-19.
- Finally, there were 13 schools up for renewal of their operator contracts this year. Of those schools, eight received 5-year renewals, three received 3-year renewals, one received a 1-year conditional renewal, and one is pending, with the Board vote scheduled for February 13, 2018.
- The Board of School Commissioners voted on recommendations from the 2017-18 portfolio review at its public meeting on December 19, 2017. The outcome of the votes can be found on our website at <http://www.baltimorecityschools.org/Page/33173>

Q3 – FY18

- In the third quarter, City Schools has begun to prepare for the annual portfolio cycle for 2018-19. This preparation has included debriefing the 2017-18 portfolio cycle, rethinking the portfolio engagement work with schools and communities, assessing our data needs, and drafting goals for the cycle. The work of closing and relocating schools has moved to a specific team that handles all logistical aspects of that work.
- The Board approved a one-year conditional renewal for the remaining charter operator on February 13, 2018. Additionally, a planning committee made up of partners, parents and community members has been meeting to work on creating a plan for a combined school in Sandtown-Winchester community. The committee will also help develop a recommendation for the Board for next year's portfolio process on which school will close at the end of the 2018-2019 school year, either Gilmor Elementary or Pinderhughes Elementary; the facility of the remaining school will become the home of the newly envisioned school developed with the community.

Q4 – FY18

- The larger goal of City Schools' portfolio review is to review the equity, quality of, and access to education in the district such that every child has high-quality options in schooling. In the fourth quarter, City Schools has begun the internal process for the annual portfolio review cycle for 2018-19. This includes onboarding of offices and data collection as well as meetings with the interdisciplinary portfolio team. This team has been meeting weekly in order to review a wide variety of data in order to determine where City Schools can most effectively make changes in its portfolio to meet those larger goals. Work on a broader engagement strategy continues, with plans to increase time and deepen opportunities for communities to engage in the process.\
- Work with the Sandtown community to develop a recommendation for one high-quality school in the area continues. A planning committee of core interested parents, community members, and partners meets every two weeks. Additionally, a survey has been developed to help understand what community members want from this new school. The survey has been used for door-to-door canvassing and community events, and will be used throughout the late summer to continue to gain preferences from a wider group of community members. Planning committee members will be developing a recommendation, which will then be shared as part of the process with the School Board which begins in November.
- Engagement regarding renewal for schools going through the process in the 2018-19 school year was begun with outreach to internal and external stakeholders. Meetings included debriefings with operators, the Charter and Operator-led Schools Advisory Board and internal offices that partner in renewal. Updates to the measures and rubric used to evaluate schools were finalized with input from these stakeholders, and were presented to the Board's Teaching and Learning committee, then to the full Board of School Commissioners for approval in June. Eight schools will be going through renewal in 2018-19. An orientation meeting was held with these schools to discuss the process for 2018-19.

Q1 – FY19

- City Schools is preparing to share recommendations from its annual review of school programs and facilities as part of the portfolio review process. This review considers a range of factors, such as academic performance, climate, quality and distribution of school programming, school enrollment and size, building utilization and condition, school locations and geographic distribution of schools and programs, schools scheduled for closure per the 21st Century Buildings Plan, and the renewal framework for operator-run schools.

For 2018-19, based on feedback from the community, the focus has been on revamping the process to include more community input into recommendations that impact traditional schools. This year there is a smaller number of recommendations as staff continues to work on changing the process to incorporate community input into the process. The portfolio recommendations for the current year are scheduled for presentation to the Board of School Commissioners on November 13, 2018. After opportunities for community feedback through school-based and central meetings, the School Board will vote on the recommendations on January 8, 2018. We will provide an update on the status of the annual portfolio recommendations and actions in the next

quarterly report.

Q2 – FY19

The Board of School Commissioners voted on recommendations from the 2018-19 portfolio review at its public meeting on January 8, 2019. In this year's portfolio review, two schools were approved for closure with building surplus: Gilmor Elementary School, in 2019, and Dr. Martin Luther King, Jr. Elementary/Middle School, in 2020. The Dr. Roland N. Patterson building was approved for surplus in 2019; the Lake Clifton building will be voted on in the coming weeks for surplus in 2019 as well.

As noted in the Q1 report above, this year's process included broader and more substantive community engagement than in prior years, including fewer recommendations, a longer timeline, engagement that informed recommendations, and in the case of the Gilmor closure, a months-long community team planning process that resulted in the recommendation itself. While the Dr. King closure has been approved, that date was delayed from 2019 to 2020 as a result of this increased community engagement. Staff will work with the community to thoughtfully plan the merging of families and students into new school communities, Edgecombe Circle, the receiving school for elementary students and Pimlico Elementary/Middle School, the receiving school for middle grades students. We will also revisit climate, safety and academic supports and work with community partners to ensure successful transitions and improved educational outcomes for all impacted students.

In addition, there were ten charter schools up for renewal of their operator contracts this year. Of those schools:

- Two received 5-year renewals: Green Street Academy and KIPP Harmony Academy.
- Three received 3-year renewals: ConneXions: A Community Based Arts Schools, Furman Templeton Preparatory Academy, and the Green School of Baltimore.
- Four received non-renewals: Banneker Blake Academy of Arts and Sciences (voted to close at a public board meeting on November 13, 2018), Monarch Academy Public Charter School, Northwood Appold Community Academy, and Roots and Branches School.
- One renewal application is pending: Independence School Local 1.

Finally, there were changes to the 21st Century buildings plan that were approved at the January 8 board meeting:

- Three buildings were approved to be removed from Exhibit 6 (the official surplus list)
 - Chinquapin building
 - Garrison building
 - West Baltimore building
- Seven changes in surplus dates were approved due to changes in construction schedules:
 - Alexander Hamilton: delay building surplus to 2021
 - Claremont: delay building surplus to 2022
 - Guilford: delay building surplus to 2021
 - Lois T. Murray: delay building surplus to 2021
 - Sharp-Leadenhall: delay building surplus to 2021
 - Southeast: delay building surplus to 2020

- William C. March: accelerate building surplus to 2021

Q3 – FY19

- City Schools is preparing for the upcoming portfolio review process. This review considers a range of factors, such as academic performance, climate, quality and distribution of school programming, school enrollment and size, building utilization and condition, school locations and geographic distribution of schools and programs, schools scheduled for closure per the 21st Century Buildings Plan, and the renewal framework for operator-run schools.
- Since quarter two, the Board had decided on a few actions that were pending. The updates are as follows:
 - Independence Local I High – renewed for three years with conditions related to addressing concerns found in the renewal process
 - Lake Clifton Building – surplus the facility Dec. 31, 2019; this effective date allows for use of the fields at the facility for fall sports for REACH! Partnership School
 - Vanguard Collegiate Middle School – delay move to Northeast Building to Summer 2020

3. Review organization and staffing structure to improve effectiveness and identify efficiencies, work with JOC/BTU to fully utilize current positions

Q1 – FY18

- The FY18 agenda for the BTU Joint Oversight Committee (JOC) includes a review of the current roles of Lead and Model Teacher positions. This agenda was set in the September 2017 JOC monthly meeting.

Prior to the FY19 budget development process, the Office of Human Capital will provide summary data to all division chiefs for each division's current district office staffing levels. These data will include, for example, spans of control for all managers, directors, executive directors, and chiefs; and ratios of district office staff counts (overall and by position level) to district-wide staff and student counts.

Q2 – FY18

- On January 16, 2018, the Office of Human Capital provided each division chief with a strategic budget planning guide to support FY19 budget development. The document presents guiding questions related to positions, organizational structure, and alignment of resources to strategic goals. In each division chief's guide, the Office of Human Capital provided summary data on current district office staffing levels, comparing the division to district averages. The data included number of positions by management level; average direct and total spans of control for managers, directors, executive directors, and chiefs; and ratios of position counts to school, staff, and student counts. An example is shown below.

Spans of Control by Supervisor Title

Title	# with Title in Division		Direct Span of Control		Total Span of Control	
	Division Average	District Average	Division Average	District Average	Division Average	District Average
Chief Officer	1		9	8.1	58	132.8
ED	2	4.3	4.5	5.8	15.5	46.4
Director	5	5.7	4.6	5.2	5.4	19.2
Manager Supervisor Coordinator	8	13.9	2.75	3.5	2.75	6.1

Title	Ratio to total # of schools		Ratio to total # of staff		Ratio to total # of students	
	Division Average	District Average	Division Average	District Average	Division Average	District Average
ED	1 : 89	1 : 41	1 : 5,500	1 : 2,538	1 : 40,296	1 : 18,598
Director	1 : 35	1 : 31	1 : 2,200	1 : 1,941	1 : 16,118	1 : 14,222
Manager Supervisor Coordinator	1 : 22	1 : 13	1 : 1,375	1 : 792	1 : 10,074	1 : 5,803

Q3 – FY18

- As part of the FY19 budget development process, all division chiefs considered a range of guiding questions, including questions related to positions, organizational structure, and alignment of resources to strategic goals. Between February 23 and March 6, division chiefs each presented multiple proposals to the Chief Executive Officer and fellow cabinet members to outline plans for their divisions. These plans were required to address alignment with the Blueprint for Student Success, improved customer service, and increasing efficiency. Context for this budget development process included a review of decreases in centralized staffing in the last several years. Between FY12 and FY18, while the district’s student enrollment decreased by 4 percentage points, the number of full-time equivalent employees funded centrally in City Schools decreased by five times as much – compromising City Schools ability to provide key supports to our schools. In developing the FY19 budget City Schools worked hard to ensure available

resources are focused on strategies to improve student outcomes – prioritizing investments in the Blueprint for Student Success. Specifically, through reprioritized Title I funds and implementation of a comprehensive plan to fundraise from the philanthropic community, the FY19 budget includes the creation of 20 full-time Literacy Coaches and 20 full-time Student Wholeness Associates – school based positions that will work in the literacy and whole child intensive learning sites.

Q4 – FY18

- The BTU Joint Oversight Committee (JOC) concluded its work for the 2017-2018 school year, which included reviews of the recent and current implementation of the Model and Lead teacher pathways. Specifically, the JOC directed the BTU Joint Governing Panel (JGP) to collect feedback from teachers on motivations for and barriers to applying for the Model and Lead teacher pathways.

Q1 – FY19

- As a result of the PSASA Joint Oversight Committee’s redevelopment of criteria for the Transformational Principal pathway during the 2017-2018 school year, City Schools released invitations for Transformational Principal applicants to eligible Principals in September 2018. This is part of a district/union collaboration outlined in school administrators’ collective bargaining agreement in support of City Schools’ Blueprint for Student Success and of increasing student learning. Additionally, a group of existing Transformational Principals continued their leadership of Principal professional learning communities that were established in the spring semester of the 2017-2018 school year.

Q2 – FY19

- In January 2019, the Board of School Commissioners approved a contract for the district to work with Public Impact to expand teacher leadership roles and align them with existing pathways in the teacher collective bargaining agreement. Public Impact has developed school staffing structure models and teacher leadership role models (i.e., "Opportunity Culture"). The organization has worked with about 200 schools in a dozen districts across the country, and a national research consortium found significant impact on English Language Arts and Mathematics student learning outcomes stemming from efforts of districts that previously engaged with Public Impact on this work.

Q3 – FY19

- In developing a proposed budget for Fiscal Year 2020, all division chiefs considered a range of guiding questions related to the budgets of district office divisions, including questions related to positions, organizational structure, and alignment of resources to strategic goals. Division chiefs each presented multiple proposals to the Chief Executive Officer and fellow cabinet members to outline plans for their divisions. These plans were informed by community engagement sessions held during the prior quarter and this quarter, during which district staff shared proposed areas of priority and received input from parents and other community members. The projected FY20 revenue required divisions to incorporate reductions in many cases, while targeting available funding to address alignment with the Blueprint for Student Success, improved customer service, and increased efficiency.

The proposed FY20 budget includes the addition of 20 more Literacy Coaches and 21 more Student Wholeness Specialists, as the district plans an increase in the number of

intensive learning sites implemented targeted literacy and student wholeness initiatives. Districtwide, the number of full-time equivalent positions proposed within the FY20 budget reflects an increase of 0.3% over FY19.

During this quarter, the Joint Oversight Committee completed its contractually-required review of the impact of the Baltimore Professional Practices and Student Learning Program (BPPSLP), the unique compensation and career pathways system first set up in 2010 for teachers and related service providers. The Joint Oversight Committee's findings and next steps were summarized as follows: "The JOC reviews data on an ongoing basis together during monthly meetings facilitated by the Joint Governing Panel and met in March 2019 to specifically discuss BPPSLP certification.

Based on its review, the JOC certifies that the BPPSLP concept has improved professional practices, increased student learning, and increased career acceleration and opportunities. The future success of this unique system is dependent on City Schools and the BTU continuing to embrace a mindset of continuous improvement. To that end, City Schools and the BTU are dedicated to the task of working together during the current contract negotiations and over the course of the next year in the JOC to collaboratively strengthen and advance this important system so that teachers are well positioned to drive and accelerate achievement for all of our students. We believe that working together, we can help each of our students develop the knowledge and skills they need to pursue the future that calls them."

4. Continue to analyze and track the staffing and position landscape throughout the year and assess impact on financial outlook

Q1 – FY18

- The district initiated a position management work group, staffed by the Offices of Human Capital, Finance, and IT, that will meet monthly to explore additional ways to monitor and assess the staffing and position landscape.
- The Office of Human Capital identified certain job titles in which to maintain vacancies between the beginning of the 2017-2018 school year and the annual enrollment adjustment period, given historical information indicating that positions in the same job titles were likely to be reduced during the enrollment adjustment period.

Q2 – FY18

- The Office of Human Capital identified certain job titles in which to maintain vacancies between the beginning of the 2017-2018 school year and the annual enrollment adjustment period, given historical information indicating that positions in the same job titles were likely to be reduced during the enrollment adjustment period.
- District office staff facilitated matches with staff and schools during the enrollment adjustment process in October and November 2017. Through this process, the district reduced the number of school-based staff without funded positions from 118 at the end of October 2017 to only 41 (25 of which were Hall Monitor staff) at the beginning of December 2017.

- By February 2018, the Office of Human Capital will identify any remaining FY18 district office vacancies for which the hiring manager/department do not intend to fill the vacancy during the remainder of the fiscal year.

Q3 – FY18

- With the three-year commitment of \$180M that City Schools is receiving from FY18 to FY20 from the State of Maryland and City of Baltimore and the cost savings and reductions in staffing that City Schools put in place in FY18, the district was able to propose a relatively stable budget for FY19. For the first time in the last few years, City Schools will not be proposing a budget based on significant budget cuts. With the FY19 budget the district is utilizing a combination of general fund dollars, reprioritized Title I funds and support from the philanthropic community to facilitate additional investment into the “Blueprint for Success” in the form of 20 Literacy Coaches, 20 Student Wholeness Room Associates, 1 Blueprint Literacy Coordinator, 1 Social Emotional Learning Coordinator and 1 Restorative Practices Coordinator. There is also an emphasis in this proposed budget on improving facilities maintenance by creating 16 Stationary Boiler Maintenance worker positions as part of the annual \$3M increase in facilities preventive maintenance funding that is required by the MOU for the 21st Century Initiative. City Schools is proposing these investments while continuing to reduce reliance on funds from fund balance. In the proposed FY19 budget, the district is suggesting a fund balance contribution of \$15M, which is down from the \$21M utilized in FY18. The Board of School Commissioners is scheduled to vote on the proposed budget on May 8, 2018, followed by a Baltimore City Council vote in late May.
- In April, all school and district office budgets were reconciled to identify next steps with respect to recruitment and staffing for vacant and newly created positions and reassignment to or application to other roles for employees in abolished positions.
- Upon Board approval of the FY19 budget, staff in positions that are no longer funded after June 30, 2018 will receive notification of the change with guidance on next steps.

Q4 – FY18

- For each employee whose existing (2017-2018) position was not funded in the Board-approved Fiscal Year 2019 budget, the district notified the employee by May 2018 of next steps for transitioning out of the 2017-2018 position either by separating from the district or through placement or selection into a different position for Fiscal Year 2019.
- The Human Capital Office and hiring managers have collaborated to prioritize hiring for new positions aligned with the “Blueprint for Success”: 20 Literacy Coaches, 20 Student Wholeness Room Associates, 1 Blueprint Literacy Coordinator, 1 Social Emotional Learning Coordinator and 1 Restorative Practices Coordinator. As individuals have been hired for these positions, offices have facilitated training to support employees’ early success in these new roles.

Q1 – FY19

- City Schools prepared guidance for Principals to support their efforts in adjusting their FY19 school-based budgets, which are based on the district’s Fair Student Funding model, after fall 2018 student enrollment numbers are finalized. The guidance provides parameters for adjusting staffing levels to meet student needs. School leaders will make

adjustments through the district's annual process for right-sizing school-based staffing to align with the number of enrolled students as of September 30th.

Q2 – FY19

- As part of the FY20 budget planning process, the Offices of Human Capital and Finance are collecting information from division leaders throughout the organization to determine potential shifts to the position landscape and financial impact, specifically with an eye toward ensuring that funds are linked to strategic priorities. For the first time, the district developed a comprehensive series of community budget meetings to present strategic priorities from all departments in the district office, not only to ensure that planning efforts were transparent, but also to solicit feedback from our families, community members, and key stakeholders, to consider when determining funding allocations for FY20. City Schools is committed not only to ensuring there is alignment across departments with respect to resource allocation, but also that resources are appropriated in accordance with priorities that align with community needs.

Q3 – FY19

- The Human Capital Office opened the window for school leaders to recommend new hires for all existing and anticipated FY20 school-based vacancies effective April 1st, earlier than at any time in recent years. This adjustment to the staffing timeline was intended to enable school leaders to identify the strongest applicants to fill these positions, particularly teaching positions for which there is significant competition with other districts in a state with too few educators graduating from IHE-based teacher preparation programs. The Human Capital Office will complete a full reconciliation of changes between the FY19 and FY20 budgets in order to ensure that the number of staff hired does not exceed the ultimate, districtwide need.

5. Compensation study to assess district office salaries and benefits in comparison to other jurisdictions

Q1 – FY18

- The Office of Human Capital developed a Request for Proposals (RFP) for the completion of a comparative compensation study to assess district office salaries and benefits. District office staff include unaffiliated staff members who last received salary increases more than 5 years ago. The purpose of the compensation study is to do a market analysis in order to determine the appropriate salary range for City Schools positions and align as necessary. The RFP will be released and a vendor will be selected this quarter.

Q2 – FY18

- The Office of Human Capital began internal reviews of compensation rates for unaffiliated positions in the central office during this quarter to inform the compensation study that will be completed during Quarter 3 by a vendor. Results will inform final FY19 budgets for central office divisions.

Q3 – FY18

- The Office of Human Capital continued internal reviews of compensation rates for unaffiliated positions in the central office during this quarter as part of its compensation study. The district reviewed various publicly available data from other Maryland districts, including data from the Maryland State Department of Education. To date,

reviews have indicated that the district's unaffiliated staff, whose salaries have not increased in more than five years, are often not competitive with peer jurisdictions or the market. The Human Capital Office is developing a series of recommendations for consideration in FY19.

- During Quarter 3, the Board approved a revised compensation policy and regulations that require an annual recommendation to the Board on salary adjustments for unaffiliated staff members.

Q4 – FY18

- Completed reviews indicated that the district's unaffiliated staff, whose salaries have not increased in more than five years, are often not competitive with peer jurisdictions. Specifically, when comparing current positions in categories (i.e., chief officer, executive director, director, legal counsel, manager, analyst, specialist, administrative assistant to a chief officer), there are consistent gaps. The Human Capital and Finance Offices made recommendations for FY19 consideration, and the district will be adjusting the ranges for unaffiliated positions across the board to ensure that it can continue to attract and retain high-quality staff.
- In Fiscal Year 2019, the district will commission a second phase compensation study to determine the feasibility of an interval structure for unaffiliated positions while identifying any specific job titles for which a range adjustment is needed in order to become or remain sufficiently competitive with peer jurisdictions.

Q1 – FY19

- The district adjusted ranges for unaffiliated positions across the board per the recommendations made in the previous quarter. This adjustment brings salary ranges for this subset of district office positions closer to those in comparable, competing districts.

Q2 – FY19

- As part of the FY20 budget planning process, the Office of Human Capital is collecting information from division leaders regarding hard-to-fill positions and potential relationships to compensation levels, in preparation for launching the second phase compensation study to determine the feasibility of an interval structure for unaffiliated positions while identifying any specific job titles for which a range adjustment is needed in order to become or remain sufficiently competitive with peer jurisdictions.

Q3 – FY19

- For FY20, a few hard-to-fill positions (e.g., Bus Drivers) were identified for a review of current compensation levels as they compare with other regional competitors. Wage rates on the applicable salary schedules will be adjusted by the Human Capital Office to ensure the district can fill these hard-to-fill positions for FY20.

6. Convene a working group with outside partners to explore potential solutions to reduce transportation costs over the long term

Q1 – FY18

- A stakeholder briefing was held in October with Maryland State Delegate Brooke Lierman and Marc Stein of the Baltimore Education Research Consortium; the meeting was open to the entire City General Assembly delegation and City Council members. In

attendance were the Chief of Staff, Chief Operating Officer, as well as, key transportation and legislative staff. Meeting topics included a presentation and discussion of City Schools' specialized transportation and the formation of a Transportation Workgroup. Next steps include identification and selection of members of an ongoing working group to study City Schools' transportation landscape and help advise on solutions.

Q2 – FY18

- The first Transportation Workgroup meeting was held January 22, 2018 with 16 attendees. The group was given an overview of City Schools' yellow bus and specialized transportation. Members of the workgroup include representatives from:
 - o Special Education Citizen's Advisory Committee
 - o Public Justice Center
 - o School Principals
 - o Active and former Directors of student transportation from other Maryland jurisdictions
 - o MTA
 - o Morgan State University Professor of Transportation
 - o Baltimore Education Research Coalition
 - o Office of Special Education
 - o City Schools

- Topics of interest for further review expressed by members were:
 - o Decision processes for determining whether a student receives service
 - o Program location
 - o Taxi cabs
 - o Ride times

Q3 – FY18

- The third meeting of the Transportation Workgroup was held on April 26, 2018. Topics covered thus far have included an overview of City Schools' transportation and challenges, and transportation of students who are homeless, as well as presentations from Baltimore County Public Schools and Philadelphia Public Schools on their student transportation operations and challenges, as well as City Schools' transportation of students with disabilities and City Schools yellow bus contract. The workgroup will continue to meet in the next quarter as the group develops recommendations for City Schools to consider.

Q4 – FY18

- The fourth and fifth meetings of the Transportation Workgroup were held on May 31 and June 28, 2018. Topics covered in these two sessions were use of alternative vehicles to transport students, taxi cab rates charged to transport students, organizational structure of City Schools' Office of Pupil Transportation, where students live in relation to the location of their school, and decision-making processes that determine a student's transportation needs. The work group listened to and asked questions of two guest panels: families of students with disabilities and school and district staff who administer student transportation in City Schools, Baltimore County and Carroll County. The workgroup will continue to meet as the group develops recommendations for City Schools to consider.

Q1 – FY19

- The sixth meeting of the Transportation Workgroup is scheduled for November 7, 2018. At this meeting draft recommendations will be presented to the workgroup for review. The workgroup's input, feedback and priorities will then be collected and incorporated into a final set of recommendations.

Q2 – FY19

The sixth and final meeting of the Transportation Workgroup was held November 29, 2018. At this meeting, draft recommendations were presented to the workgroup for review. The workgroup's input, feedback and priorities were collected to incorporate into a final set of recommendations. The final report of recommendations is underway.

Q3 – FY19

- The Transportation Workgroup's final report is attached.

7. Analyze the effectiveness of the revised temporary employee position guidelines in reducing costs and gaining efficiencies

Q1 – FY18

- The Offices of Human Capital and Finance will be reviewing temporary employee costs to see if there are more efficient ways to utilize staff that would reduce expenditures as part of the FY19 budget development.

Q2 – FY18

- The Office of Human Capital revised the Budget Guidance document provided to school leaders to guide their FY19 budget development. The revised document provides notice that any temporary staff funded in FY19 would be reviewed during the first quarter of FY19 to ensure alignment with existing guidance on the employment of temporary staff.
- District office staff reviewed and determined a need to expand upon guidance regarding temporary staff and stipends that was released in August 2015. The Office of Human Capital is currently revising this guidance to release a more comprehensive update to the guidance before the start of FY19.

Q3 – FY18

- The Office of Human Capital has requested to include an update to the district's current policy on temporary employment on the July agenda of the Board of School Commissioners' Policy Committee. Planned updates to guidance on temporary employment will be aligned with a revised policy to be implemented before the 2018-2019 school year.

Q4 – FY18

- In July 2018, the Board of School Commissioners' Policy Committee reviewed a proposed temporary employment policy and proposed temporary employment regulations. The proposed policy and regulations are intended to guide and limit the use of temporary employees to specific situations while ensuring that temporary employees are not hired in place of full-time and/or full-year employees.

Q1 – FY19

- On October 9, 2018, the Board of School Commissioners approved the temporary employment policy and regulations. Per the policy, the Human Capital Office will report

to the Board on an annual basis the total number of temporary employees used, their pay and their assigned locations. This report shall be submitted to the Board by September 30 and will include data for the previous school year, beginning September 30, 2019.

Q2 – FY19

- The Budget Guidance document provided to school leaders to assist with their FY20 budget development provides reminders of the requirements of the temporary employment policy.

Q3 – FY19

- There are no updates at this time.

8. Partner with Center Baltimore Partnership to issue RFP re: cost benefit analysis to retain district headquarters at North Avenue

Q1 – FY18

- City Schools partnered with The Central Baltimore Partnership to release a Request for Proposal (RFP) for the 200 East North Avenue Economic Development Assessment in August 2017.
- City Schools and CBP will seek competitive proposals from qualified industry professionals to prepare a comprehensive comparative cost benefit analysis of retaining the Baltimore City Public Schools (City Schools) headquarters at 200 E. North Avenue (“Site”) or relocating.

The analysis will include existing and future operating costs, near- and mid-term capital costs, deferred maintenance, operational efficiencies and inefficiencies, space planning, and conceptual test fit for a new location. City Schools will only consider relocation options that, when including all costs including relocation costs, reduce City Schools’ operating costs for its central office functions or result in a relocation plan that is cost neutral but results in office space that more effectively support City Schools’ operations and its capacity to deliver on its mission and vision. In addition, the consultant will complete a highest and best use analysis for 200 E. North, including an estimate of value.

The Respondents to the 200 East North Ave Economic Assessment RFP are to provide a presentation of their proposal to a select committee the first week of November.

Q2 – FY18

- A panel was established by The Central Baltimore Partnership including: Baltimore Partnership, Baltimore Development Corporation, Baltimore City Public Schools and City representation. The panel has reviewed RFPs and will make a selection in January for the analysis.

Q3 – FY18

- Cushman & Wakefield and JRS Architects (the team) have been selected as the team to provide the Economic Development Assessment for the Baltimore City Public Schools (BCPS) headquarters at 200 East North Avenue.

- The team will provide a multiple scope of services to complete the Highest and Best Use study, approximately 16 weeks from engagement, with a final report delivery date target on or before July 30, 2018.

Q4 – FY18

- Cushman & Wakefield and JRS Architects delivered the Market Demand Programming Study on Tuesday, July 24, 2018. The Committee presented their preliminary findings on July 25, 2018. A final report will be submitted by the end of September.

The Executive Summary findings highlighted the following features of the 200 East North Avenue location:

- Incredibly diverse demographic base in the local neighborhoods
- Excellent access to mass transportation (Light Right / Penn Station)
- A location that is central to colleges, universities, and local healthcare
- A lack of medical services in the area to support developing communities and businesses
- A current facility that can be revitalized and upgraded for use as General Office space
- A location that can be used for possible redevelopment into multifamily living units for seniors
- Potential to convert the first floor into a large supermarket to support communities and businesses
- The Alice G. Pinderhughes legacy for Baltimore City and Baltimore City Schools employees

Q1 – FY19

- On October 13, 2018, Cushman & Wakefield and JRS Architects presented for consideration by City Schools representatives an operating expense analysis as well as a relocation financial analysis.
- The next steps are for Cushman & Wakefield, JRS Architects and Central Baltimore Partnership to develop and present further analysis to City Schools' School Committee and Finance Department for feedback and discussion. Thereafter a presentation will be made to the Board of School Commissioners.

Q2 – FY19

- In October 2018, Cushman & Wakefield and JRS Architects presented for consideration by City Schools representatives an operating expense analysis as well as a relocation financial analysis.

The next steps are for Cushman & Wakefield, JRS Architects and Central Baltimore Partnership to develop and present further analysis to City Schools' School Committee and Finance Department for feedback and discussion. Thereafter, a presentation will be made to the Board of School Commissioners.

The Executive Summary and Conclusion and Recommendations findings highlighted the following issues:

- Continued tenancy at 200 E. North Ave by City Schools will come with high operating costs and capital needs.
- Market demographics are not favorable in the short term for other uses of the 200 E. North Ave property, but are more favorable in the long term.

- Feasibility of re-use of the existing property by a non-office use is limited due to conversion costs.
- Redevelopment would require incentives to finance.
- Stay vs Go Analysis indicated a risk of asset vacancy if City Schools relocated.
- Stay vs Go Analysis indicated City Schools would bear a cost if attempting to relocate and sell vacant building, due to relocation costs.
- Stay vs Go Analysis indicates a favorable outcome of the option of selling the building to another party and leasing back the building to City Schools. City Schools would incur annual leasing costs but receive infusion of cash for capital needs.

Cushman & Wakefield has scheduled a February 2019 meeting with City Schools representatives to review the study.

Q3 – FY19

- Cushman & Wakefield and JRS Architects presented the results of the study to the Board of School Commissioners and to outside partners in April 2019. The results appear to indicate that relocating from the North Ave building is not a feasible solution at this time and would cost the district monetarily. A final report is expected soon and will be available in time for the next installment of the Financial Recovery Plan.

9. Negotiations with bargaining units (specific reference to AU and pathway progression)

Q1 – FY18

- At its October 24 public meeting, the Board of School Commissioners approved a three-year collective bargaining agreement ratified earlier this month by the Baltimore Teachers Union. Protracted negotiations for this agreement began over a year and a half ago, with the district maintaining the position that revisiting salary scales to identify cost savings would be necessary to maintain the long-term financial sustainability of the contract.

This position ultimately led to impasse and a mediator's recommendation to reopen the agreement in FY18 to discuss a potential COLA or stipend only and a reopener in FY19 to discuss changes to salary scales. While the mediator's recommendation did not go as far as the district hoped it would to address the continued escalation of salaries, ultimately, the district and union agreed to move forward with the recommendation, with the understanding that the district would pursue the cost savings it needs long-term through the FY19 contract reopener. In addition, the district and union agreed to work in the meantime through the Joint Oversight Committee (JOC), a provision in the collective bargaining agreement, to address AU accrual and pathway progression. The approved agreement also included the approximately \$4M in annualized, recurring cost-savings through changes in health care employee contributions and plan design changes, set to begin in 2019, that had previously been mentioned and tentatively agreed to by the two parties.

Negotiations are ongoing between City Schools and all of the district's other employee bargaining units.

Q2 – FY18

- Following a fall 2017 agreement aligning with the mediator's recommendation, the district and the Baltimore Teachers Union have continued negotiations over a potential COLA or stipend for FY18 and over potential changes to salary scales beginning in FY19.
- Negotiations are also ongoing between City Schools and each of the district's other employee bargaining units.
- The district resumed monthly meetings of its Joint Health Insurance Committee in January 2018, reflecting a shared interest among the district and its union partners to identify and implement, as applicable, options that may reduce shared health care costs while maintaining a well-rounded benefits plan for employees.

Q3 – FY18

- In April, the district and the Baltimore Teachers Union ratified a successor collective bargaining agreement that extends through June 30, 2019. The agreement included a 1% cost of living increase effective (retroactively to) July 1, 2017 and a 1.5% cost of living increase effective January 1, 2019. This agreement retains cost saving measures negotiated in 2017 related to health care.
- Negotiations are also ongoing between City Schools and each of the district's other employee bargaining units.
- The district has continued monthly meetings of its Joint Health Insurance Committee since January 2018. This Committee has provided input on the requests for proposals for several of City Schools' health care plans.

Q4 – FY18

- In June, the district and the administrators' union ratified a successor collective bargaining agreement that extends through June 30, 2019. The agreement included a 1% cost of living increase effective (retroactively to) July 1, 2017 and a 1.5% cost of living increase effective January 1, 2019. This agreement retains cost saving measures negotiated in 2017 related to health care.
- Negotiations are also ongoing between City Schools and each of the district's other employee bargaining units: CUB, FOP, and Local 44.
- The district has continued monthly meetings of its Joint Health Insurance Committee since January 2018.
- The district completed a Request for Proposal process for our Rx plan and, as a result of the process, the district will save approximately \$2.7M in FY19.

Q1 – FY19

- The district and the City Union of Baltimore ratified a collective bargaining agreement that extends through June 30, 2019 in August 2018. The district and Local 44 ratified a collective bargaining agreement that extends through June 30, 2019 on October 23, 2018. The district currently remains in negotiations with FOP. Each of the ratified agreements incorporates the same health care cost saving measures previously included in ratified agreements with other unions. In September 2018, after input from all unions through the

Joint Health Insurance Committee, the district decided to implement a new Step Therapy program within its contract with Express Scripts effective January 2019. The Step Therapy program is estimated to save \$0.9M per year beginning in calendar year 2019.

Q2 – FY19

- The district continued negotiations with FOP, the only union operating with an expired collective bargaining agreement. In the fall of 2018, the district and FOP signed a partial agreement to implement the same health care cost saving measures previously included in ratified agreements with other unions. District staff have begun preparations for launching new collective bargaining agreement negotiations with each of its unions for FY20 and beyond.

Q3 – FY19

- The district and the Baltimore Teachers Union have begun negotiations for a successor agreement to the collective bargaining agreement covering the period from July 1, 2016 to June 30, 2019.

10. Review FSF model, identify ways to enhance equity, efficacy, and transparency

Q1 – FY18

- City Schools has partnered with outside consulting firm Education Resource Strategies to perform a review of the per pupil funding mechanism we currently use to fund our schools called Fair Student Funding (FSF). The FSF review is designed to assess implications of our funding model on equity across our schools. Through the review we are working to ensure FSF is providing adequate funding to every school and student and that funding is provided to students based on need. Another key goal of this work is to increase transparency of how our schools are funded while ensuring school leaders have the flexibility to foster strategic school design. A Design Advisory Team was assembled to incorporate input from several central office departments and some principals. In addition, principal focus groups and community outreach events are taking place from October to December in order to solicit feedback on the current funding model and options potential changes we are considering making to FSF. Once decisions are made we will also engage school communities and the broader community to make sure they understand the resulting funding formula.

Q2 – FY18

- On January 23, Baltimore City's Board of School Commissioners voted to approve the new Fair Student Funding model for the next year while holding schools harmless for any reductions they may have received due to the change in funding. The new model includes weights for poverty, concentrations of poverty, baseline services, high schools and gifted and talented programming. The model represents City Schools' commitment to equity, and reflects the district's values as well as the feedback received from the community and school leaders. City Schools will continue to solicit feedback from all stakeholders on the new funding model over the next year so that a final recommendation can be made to the Board for the FY20 budget.

Q3 – FY18

- Following the implementation of the new Fair Student Funding model in January, City Schools has rolled out allocations to schools utilizing the new funding model for the development of their 2018-2019 school year budgets. City Schools will continue to

engage stakeholders for feedback on the updated funding model in preparation for making revisions to the 2019-2020 school year budget allocations.

Q4 – FY18

- City Schools will perform a review of the application of the new funding model and its effect on schools in this quarter. In addition to engaging the community and school leaders for feedback on the implementation and transparency of the model, the district will examine the distribution of funding to determine if the updated model achieved the goals of providing greater equity and the opportunity for strategic school design.

Q1 – FY19

- The adjustment of school budgets based on the September 30th enrollment count has provided city schools with a full year's worth of data on the implementation of the new funding model. This new insight into the application of the model will be incorporated into the ongoing review of the new model's effectiveness.

Q2 – FY19

- Data analysis of the change in average per pupil by school showed that in FY19, more funding was distributed to schools in higher poverty areas of the city. For FY20, the district is looking at alterations to the Baseline Funding supplement in the new funding model which allocates additional resources to schools based on a number of factors. The district has found that the model as implemented does not always accurately provide the additional resources to the highest needs schools but sometimes to schools who, due to their larger enrollment, are not experiencing as great of a need as smaller schools.

Q3 – FY19

- City Schools has implemented the updated FSF model again for FY20 with minor adjustments to the baseline services model carried over from the fall enrollment adjustments. The hold harmless supplement for schools experiencing reductions in funding from the FY18 model was reduced to further transition schools fully into the new model.

11. Pursue grants and philanthropic partnerships and funding opportunities

General Partnerships

Q1 – FY18

- As part of the Financial Recovery Plan we indicated that the district would continue to pursue philanthropic partnerships and funding opportunities that support City Schools. Our most notable recent partnerships are with the Heart of America Foundation, the Baltimore Ravens, and Under Armour. Through these partnerships, we have been able to complete significant beautification projects in five schools in the past year – Westport Academy, James McHenry Elementary, George Washington Elementary, Thomas Johnson Elementary, and Renaissance Academy. We have also been able to provide uniforms to all our high school varsity athletes and coaches, and connect our coaches and athletic directors to high quality professional development.

Q3 – FY18

- Heart of America and Under Armour agreed to undertake beautification projects this Spring at three schools: Harlem Park, Collington Square and Francis Scott Key. Schools were notified of the decision in March. In addition, Under Armour has partnered with

Local Initiatives Support Corporation (LISC) to undertake facilities projects in 12 schools worth up to \$25,000 per school. The Fund for Educational Excellence and City Schools reviewed the semifinalists' proposed projects and a final decision should be made in Q4. Projects included installing a playground, renovating a weight room and renovating a classroom to serve as a health/physical education space for all students as well as a study hall for student athletes.

Q4 – FY18

- City Schools continues its partnerships with Heart of America and Under Armour. Three schools received beautification projects this spring, and 12 City Schools will benefit from Under Armour facilities grants this summer. These projects include constructing study spaces for students, refinishing gymnasium flooring, and installing a playground.

Q1 – FY19

- City Schools continues its partnerships with Heart of America and Under Armour. Edmondson - Westside High School underwent a beautification project this fall led by Heart of America, and 12 City Schools benefited from Under Armour facilities grants that were completed this summer and early fall.

Q2 – FY19

- City Schools continues to work with the Baltimore Student Athlete Coalition, which includes Under Armour, the Baltimore Ravens, the InSideOut Initiative, the Fund for Educational Excellence, and City Schools, to use the power of sports to transform the lives of student athletes throughout City Schools while promoting more equitable access to enriching activities, particularly sports. Through this partnership, Under Armour has provided more than 5,300 student athletes and coaches with new uniforms or apparel. The Coalition has created a Baltimore Student Athlete Leadership Council, comprised of one male and one female representative from each City Schools high school, who come together several times a year for leadership and character development trainings. Lastly, Under Armour has partnered with City Schools to launch another round of Facility Improvement Grants. The Request for Proposals were completed by schools in January 2019. Approximately 10 – 15 schools will be selected in Spring 2019 to receive grants, and construction will occur during summer 2019.

Q3 – FY19

- Under Armour provided \$250,000 in Facility Improvement Grants to 12 schools to complete projects focused on improving the quality, safety, and accessibility of athletic, academic and recreation facilities with particular focus on improving the student-athlete experience, wellness and student wholeness. These projects are now underway and will be completed in Spring/ Summer 2019.

Blueprint

Q1 – FY18

- The district recently released *Building a Generation: City Schools' Blueprint for Success*. This document is the product of a work group of district and school leaders and community partners who explored national and international research on best practices in the areas of student wholeness, literacy, and leadership. The document is a strategic, evidence-based guide to what students will be taught, how they will be taught, and how to improve the environments in which they are taught, with markers along the way to ensure we are moving in the right direction. Work group members studied characteristics of high-performing education systems around the world and interviewed national and

international experts in the respective focus areas of student wholeness, literacy, and leadership. Since the Blueprint was released, an internal team has been working to implement these recommendations in our schools. Initial cost estimates suggest that such implementation will total approximately \$42.2 million over four years. The district has realigned its resources to strategically invest in the Blueprint focus areas with approximately \$24.7 million in existing dollars redirected towards these efforts over the next four years. This leaves a gap of about \$17.5 million that the district is working to close through additional fundraising.

Q2 – FY18

- Since the Blueprint was released, an internal team has been working to implement these recommendations in all of our schools. In addition, 55 schools have been selected as intensive learning sites. Staff at these sites will receive additional coaching and support in their designated area – literacy, restorative practice, or social emotional learning.

Q3 – FY18

- Fundraising for the Blueprint is now underway and has already resulted in commitments of over \$2.2 million over the next 18 months including well over \$1,000,000 in funding from local funders. Nationally, the district has received \$750,000 of philanthropic support to date, with additional opportunities in the pipeline as we continue to apply for competitive grants.

Q4 – FY18

- Quarter Four fundraising activities netted a rough total of \$2.8 million, bringing our total raised to date to over \$5 million. We continue to pursue grant opportunities and have several additional prospects in our pipeline.

Q1 – FY19

- First quarter fundraising activities included a four-year grant totaling up to \$11.2 million dollars from the Gates Foundation. This was a highly competitive process in which over 525 applicants from school districts and outside intermediaries across the country applied to compete for higher level Phase I grants that were awarded to only 5 applicants. City Schools was the only school district in the country to earn a grant award from the Gates Foundation. The grant includes a substantial investment in our secondary Intensive Learning Sites in support of the Blueprint literacy work.

Q2 – FY19

- In Q2, City Schools focused on launching and sustaining existing projects funded with philanthropy. In Q3, we intend to ramp up national fundraising and seek recommitments from local funders.

Q3 – FY19

- In Q3, City Schools continued its focus on sustaining existing Blueprint projects funded with philanthropy. In addition, City Schools created FY20 budgets for existing grants and continues to develop additional asks for philanthropic partners in the future.

12. Update Master Plan in alignment with district priorities and MSDE requirements

Q1 – FY18

- At the September 26 meeting of the Board of School Commissioners Teaching and Learning Committee, City Schools presented the 2017 Master Plan which, in addition to the MSDE requirements requested, also included details regarding the district's *Blueprint for Success* as well as the alignment of resources including Title dollars and school improvement funds to invest in the district priorities outlined in the Blueprint.

Q2 – FY18

- Per the first quarter report, this item was previously completed.

Q1 – FY19

- The draft of the 2018 Master Plan was presented to the Board of Commissioners on October 9, 2018. City Schools is now gathering feedback on the draft until November 9, 2018.

Q2 – FY19

- The Bridge to Excellence: City Schools Master Plan 2018 was voted on and approved by the Board of Commissioners on November 13, 2018.

Q3 – FY19

- This item was previously completed. There are no updates at this time.

13. Monitor the expenditures and use of grant funds to achieve compliance with statutory requirements and strategic use of resources

Monitoring of Grant Expenditures (Updated for Q3 FY19)

- The monitoring of grant expenditures occurs on a monthly basis utilizing a “Snapshot” report. The Snapshot report is generated by the Grants Accountant in the Office of Finance and provided to the grant manager and their supervisor(s). The Snapshot report serves to:
 - Provide an analysis of expenditures to date as compared to the approved budget, identifying any areas of misalignment, and remaining funds available for spending;
 - Identify if spending is on track within the grant timeframe (i.e. slow spending); and,
 - Provide data on all salaries and vendor payments charged to the grant, plus encumbrances that need to be addressed.

In addition, starting in SY2017/18, as part of the Grant Manager roles and responsibilities, they are expected to meet with the Grants Accountant at least bi-monthly to review the Snapshot Report and determine steps needed to address any issues. The Office of Data Monitoring and Compliance in partnership with the Office of Finance provides grant manager training opportunities throughout the year to support administration of assigned grants. Mandatory grant manager training sessions have been held on October 29, 2018 and January 7, 2019.

Compliance with Statutory Requirements

- In the development of grant applications, City Schools outlines how the statutory requirements of the grant will be met. To verify compliance, City Schools completes self-monitoring activities as well as participates in multiple monitoring activities conducted by MSDE annually to verify that grant implementation is in compliance with all statutory requirements.

Grant	Monitoring Date	Required Follow-ups to Support Compliance
FY17 Title I, Part A	2/8/17	3 Follow-up Actions Required. 2 of 3 completed. 3 rd due to MSDE 10/30/17.
FY18 Title I, Part A	2/23/18	Feedback indicated additional information was needed with respect to 2 areas. Information was provided per set deadline. No compliance findings.
FY19 Title I, Part A	12/10/18 2/28/19	Part I of the monitoring completed for 4 components. Monthly meetings to support monitoring of Title I Parent and Community Engagement spending to occur with MSDE. Part II of the monitoring was completed. Only one area requiring follow-up due to one paraprofessional not meeting licensure requirements.
FY17 Title I, Part D	9/8/17	None
FY18 Title I, Part D	9/19/18	None
FY19 Title I, Part D	June 2019	FBD
FY17 Title I Focus Grant	8/3/17	None
FY18 Title I Focus Grant	8/1/18	None
FY17 Title II	6/13/17	None
FY18 Title II	1/10/19	None
FY17 Title III	3/29/17	1 follow-up data request completed by due date. No further action required

Strategic Use of Resources

- City Schools has worked with Grant Managers to, where possible, align grant spending plans for SY2018/19 with the focus areas of City Schools' Strategic Plan, the *Blueprint for Success*. The Blueprint outlines three focus areas: literacy, student wholeness and leadership.
- The SY2018/19 Title I application outlines funding for a number of new district initiatives:
 - Support for gifted learners in Title I preK – 5 schools
 - Implementation of 15 Title I schools to be intensive literacy support sites
 - Implementation of 15 Title I schools to be intensive whole child sites
 - Support for a pilot project on the development of supports for teacher leaders in approximately 15 Title I schools

- Plans developed for schools identified by MSDE in need of turnaround (Comprehensive Support and Improvement (CSI) and School Improvement Grant (SIG) schools) utilizing Title I, Part A, Title I 1003(a) and School Improvement Grant (SIG) funds will align with all MSDE requirements while implementing a framework that aligns with the Blueprint. The plans for the new cohort of CSI schools are in the development process. The SIG schools are implementing their year 2 plan.
- The SY2018/19 Title IV grant application was aligned to the professional development supports outlined in the student wholeness section of the Blueprint, along with supports for 21st century learning within the new and renovated school buildings.

14. Implement strategic staffing processes to place high performing principals in high needs schools, and utilize mentor principals as key agents

Q1 – FY18

- In August 2017, the district began a redesign of its principal selection and placement process in advance of the recruitment and selection season for the 2018-2019 school year. Refinements include increased focus on fit between specific schools’ needs and the leadership profiles of candidates who are accepted into the district’s pool of prospective principals. The process redesign will be completed this quarter. In September 2017, the district developed new procedures for the selection of principals for new and merging schools.
- Beginning in the spring of 2017, three of the SIG IV schools (Mary E Rodman, James McHenry, Harford Heights) engaged in a partnership with Commodore John Rogers in what is called the 100% Project. This strategy provides a collaborative community and developmental support across all three SIG IV schools that will replicate the success of Commodore John Rogers. Important to the success of the model, there was recruitment and hiring of an effective school leader from within the district. Additionally, existing school-based staff engaged in a strategic staffing process. Staff from across the three schools partner with Commodore John Rodgers for new, common PD, and current teachers and leaders from Commodore provide training and support to staff at the SIG IV schools. As part of the developmental support to the schools, Commodore John Rodgers serves as a LAB school to allow teachers and leaders from SIG IV schools to observe all aspects of the school regularly.
- The Director of Leadership Support and Development was hired in the summer of 2017. This staff member’s responsibilities include the development and oversight of principal mentoring activities to support early career principals.

Q2 – FY18

- In January 2018, the district administered the first central “Assessment Center” screening process for principal candidates since the district updated its principal selection and placement process.
- The Director of Leadership Support and Development led the development of a new multi-year induction program for assistant principals and principals during the last quarter. The programs will launch at the start of FY19 and will target all new-to-role assistant principals and principals, as well as some other assistant principals and/or

principals identified by principals and principal supervisors. Both induction programs leverage sitting principals and district office leaders to facilitate group learning and personalized coaching and mentoring.

Q3 – FY18

- The district has continued processes that solicit meaningful input from School Family Councils on the selection of principals to fill anticipated vacancies. Input from School Family Councils and Instructional Leadership Executive Directors informs the district on the most applicable candidate profiles for each school, with a focus on fit with the school's specific needs and level of need. By the end of April, candidates were selected and appointed for nearly half of all anticipated principal vacancies for the 2018-2019 school year. Also, in SY1819, City Schools anticipates expanding the 100% project to another school community and will include additional information on this in the Q4 report.

Q4 – FY18

- By June 2018, the district identified 2018-2019 principals for all but one of its traditional public schools. Sixteen (16) traditional schools will experience a principal change for 2018-2019, and only 10 of these schools will have a first-time City Schools principal. This is as low as principal turnover has been in more than a decade. With principal changes in only about 10% of traditional schools, there's more consistency in the principal role than there has been in any other year in the last decade.
- We continued to make strategic staffing decisions to place high-performing principals in high-need schools and to more closely match schools with best-fit principal. The 100% Project was expanded to include the Academy for College and Career Exploration and Nicholas D'Ambrosio was appointed as the new ACCE principal; Mr. D'Ambrosio was reassigned from Roland Park Elementary/Middle School, where he had effectively served as principal for several years. Additionally, the CEO reassigned strong, experienced principals to four other schools. These include Frederick Douglass High School, Gilmore Elementary School, and Renaissance Academy, along with Alexander Hamilton (which is scheduled to close in one year).
- Most principal appointments this year were informed by a full, usually months-long process with the school's School Family Council, which provided input on the selection of a new principal.

Q1 – FY19

- In September 2018, the Board of School Commissioners approved a contract with BKL & Associates to provide coaching to new Principals. This organization has provided similar services to the district in other recent years. For the 2018-2019 school year, the district's contract with BKL & Associates incorporates the development of additional internal capacity among the district's highly successful Principals to mentor peers. This shift will enable the district to more effectively utilize its own principals to mentor others as key agents for improving outcomes in low-performing schools.

Q2 – FY19

- During this quarter, City Schools received and began reviews of applications for its next cohort of Transformational Principals – the first new cohort in two years. The district and its administrators' union (PSASA) negotiated years ago to create career pathways for

high-performing principals. In the 2016-2017 school year, the PSASA Joint Oversight Committee agreed to review the criteria and process for identifying Transformational Principals.

School leader feedback was gathered in the fall and spring of the 2017-2018 school year to further inform the creation of an updated process for identifying future Transformational Principal cohorts. Once identified, Transformational Principals further support both their peers and the larger district community, while ensuring excellent teaching and learning in every classroom.

As part of their responsibilities and good standing on this career pathway, Transformational Principals work with the Director of Principal Leadership Development and lead additional activities designed to further create and sustain growth across City Schools. Areas of focus for Transformational Principals include mentoring activities, professional development activities, learning site activities, and policy implementation activities, which are all seen as key levers in supporting district priorities. A critical opportunity for Transformational Principals to strengthen our district and student experience is through developing the capacity of other school leaders through the mentoring of aspiring Principals (i.e., Principal Residents), new/novice Principals, and early career Principals.

City Schools is dedicated to fully supporting Transformational Principals to ensure engagement in the career pathway is rich and rewarding – for the district, the principal, and the schools and leaders that principal supports. The commitment of the district goes beyond the provisions of salary adjustments associated with career pathway movement to include developing Transformational Principals through opportunities to build their capacity so that they are better equipped to build the capacity of others.

Q3 – FY19

- During this quarter, City Schools completed reviews of applications for its next cohort of Transformational Principals, and two additional Transformational Principals were identified.

15. Implement \$125 per pupil fees for charter schools to offset emergency response services provided by City Schools

- City Schools expects to proceed with its plan to charge charter schools the assessed \$125 per pupil fee for emergency response services during Fiscal Year 18.

Q3 – FY 18

- In FY19 City Schools instituted other changes to the charter formula to more accurately reflect the costs of providing services to charters including assessing the 2% fee for centralized services at an earlier point in the calculation of the charter per pupil to include a larger portion of the administration of services such as special education and pre-kindergarten. In addition, City Schools will be charging charter schools for costs accrued at the school level such as tuition reimbursement and long term substitutes.

Q1 – FY 19

- City Schools continues to enact the \$125 per pupil charge for emergency services to charter schools in FY19.

Q3 – FY19

- The Maryland State Board of Education has ruled that services provided by City Schools' School Police are not covered by the 2% administrative fee in the per pupil funding formula and that unilaterally charging a flat fee is illegal. Therefore, City Schools must negotiate a fee for charters. The challenge is that receipt of this service is not a choice for charters. Any school that calls 911 is connected to City Schools Police for the provision of emergency services, so absent the ability to charge for these services, school police services for charters are being subsidized by traditional school students.

16. Continue to progress on plan to ultimately surplus 26 facilities to the City of Baltimore

Q1 – FY18

- City Schools currently plans to close and surplus three buildings back to the City of Baltimore in Fiscal Year 18.

Q2 – FY18

- City Schools has submitted a state form for the closure of the following schools: Patapsco, Westside, Rognel Heights, and Carter G. Woodson. For next steps the City will begin the process of reviewing closed facilities through the formal process of the Space and Use Committee to determine the agency for disposition. In addition, an advisory group managed by the City Planning Department will run an RFP process to determine an appropriate user for the vacated facilities.

Q3 – FY18

- In addition to the action items mentioned in the second quarter update, City Schools is a member of the School Surplus Taskforce, an advisory group managed by the City Planning Department that works to identify future uses for the surplus buildings so that even after closure, the buildings/lots can continue to support the community. A marketing event for these buildings/lots is taking place May 9 to provide information to interested parties including the private sector.
- Per the Carter G. Woodson facility referenced above in Q2, it should be noted that the building surplus was delayed until 2020. Given a delay in the construction schedule at Bay Brook, City Schools needs to continue utilizing Carter G. Woodson as swing space and therefore must push back the surplus date.

Q4 – FY18

- Three buildings are in the process of being surplus to Baltimore City in 2018, including Rognell Heights, Westside, and Patapsco.

Q1 – FY19

- City Schools has surplus 11 of 26 buildings back to the City of Baltimore thus far. For Fiscal Year 19, the District tentatively plans to surplus four buildings back to the City.

Q2 – FY19

- Since 2013, City Schools has surplus a total of eleven facilities back to the City of Baltimore; an additional three buildings will be surplus in 2019 with more to follow in 2020.

Q3 – FY19

- Since 2013, City Schools has surplused a total of 14 facilities back to the City of Baltimore as of the end of SY1819.

17. Focus on strategies to boost enrollment including door-knocking campaign during summer 2017, task force with community partners, strengthen middle grade academic offerings

Q1 – FY18

- This summer City Schools partnered with the Baltimore Teachers Union and the City of Baltimore to engage in a grassroots door knocking effort to boost enrollment in a targeted group of schools and neighborhoods. The effort led to over 30,000 doors knocked, over 5,000 conversations with families, and hundreds of enrollments in target schools. Although we are not able to determine the level of causality, the initial data are promising. At a time when overall district enrollment was expected to decrease by 1%, projections indicate that enrollment in the target schools increased by 2.8%. Even when removing a possible outlier, Fort Worthington, a new 21st century school that merged with a closing school and experienced a 35.6% increase, the target schools still increased by 1.4% overall. Of the new students enrolled in the target schools, 54% of them were new to the district while 46% transferred from another school within the district.
- Dr. Santelises and the Board of School Commissioners have announced the creation of an enrollment task force to recommend strategies to sustain and grow enrollment in City Schools. The task force has invited participation from 22 prospective members, representing a diverse group of business, non-profit, and community leaders. The task force expects to have initial recommendations for the district to consider by April 2018.
- As the size of central and school based staff has decreased as part of cost saving measures, improved customer service is increasingly important to ensure the provision of effective and efficient services to our staff, stakeholders and community. Improving customer service is also central to attracting and retaining families electing to send their young people to City Schools. Given that, City Schools has launched an internal workgroup to improve customer service. The workgroup has developed a curriculum and has begun rotating departments through the customer service training. The workgroup will continue to train district and school based staff in the months to come.
- City Schools has launched an internal workgroup to develop a set of recommendations to improve equity of access and promote strong middle grades options for families. The workgroup has conducted an analysis of community conditions across the district to understand the neighborhoods, challenges and opportunities within the communities where schools are located and students reside. The workgroup conducted an initial survey of stakeholders – including school leaders, teachers and students - to determine what these stakeholders value in middle school programming and what they saw as lacking in middle grades programming. The workgroup also conducted an initial analysis of immediate leverage points for expanding access to core middle grades opportunities that better position students for success and ultimately lead to increased access to more challenging high school options. The workgroup is also developing a comprehensive strategic plan that will address issues such as course offerings, human capital needs,

professional development, social emotional needs of middle grades students, and access to rich and varied experiences.

Q2 – FY18

- The first enrollment task force meeting took place on November 15, 2017. The second meeting will be held on February 6, 2018. At that meeting, the three subcommittee workgroups will be reporting on their findings. The three subcommittees are as follows: Enrollment & Retention Strategies, Public Relations & Marketing, and Customer Service. The second meeting will be to suggest strategies that could be implemented in the short term while final recommendations are being made for the April task force meeting.
- City Schools' internal middle grades workgroup is working to take the information gained from stakeholder surveys and initial research and analysis to develop a comprehensive strategic plan. The plan is currently in development and will be shared with stakeholder focus groups in early spring to gain additional input and insight prior to recommending actions to the CEO. The plan will address middle grades issues such as course offerings, human capital needs, professional development, social emotional needs and access to rich and varied experiences.

Q3 – FY18

- The enrollment task force is scheduled to have its final meeting on Monday, May 7. At this meeting, the working groups will report back to the task force with their research and findings. After the conclusion of this meeting, a final recommendation report will be prepared and publicly presented to the CEO and Board of School Commissioners and the general public. This presentation is tentatively scheduled for June.
- The City Schools internal middle grades work group has had three specific recommendations vetted with district staff so far. The first recommendation, which is long-term, focuses on creating appropriately sized middle grades programs over time. The second two recommendations are first, piloting a middle grades seminar model in up to ten schools, and second, increasing algebra access for 8th graders through providing teacher training and resources for 6th grade honors in a cohort of 10 schools. The team is working to use a variety of data points to identify the appropriate pilot schools for these recommendations. The identification and subsequent engagement with schools is expected to occur during the fourth quarter.

Q4 – FY18

- City Schools has partnered with the Baltimore Teachers Union, the Mayor's Office, and Live Baltimore to administer the B3 program for the second year. This grassroots door knocking effort to boost enrollment was extremely successful last year, leading to an increase of enrollment in target schools by 2.8% overall. The B3 advocates are aiming to knock over 35,000 doors this summer in the following targeted zones: areas with a high number of student drop-outs in grades 6 through 9, areas with chronically under-enrolled Pre-K programs, areas with new 21st Century Schools, schools that are part of the 100% project, and schools that are Blueprint Intensive Learning Sites. Additionally, Live Baltimore will be hosting 8 events at different schools throughout the month of August to encourage interested families to meet school staff and administration before the school year begins.

- After the final meeting of the enrollment task force, a public presentation was made on June 12 outlining the work that was done by the task force as well as recommendations. After the presentation, City Schools contacted the Baltimore City Council to discuss how they might partner with us in our work moving forward; met with the Mayor's Office of Immigrant Affairs to develop different strategies for better serving our immigrant population; and started discussions on how to best bring our recommendations to the broader Baltimore City community. Additionally, an internal workgroup comprised of staff members who were participants in the task force are currently reviewing and prioritizing recommendations and preparing implementation steps for senior leadership to review.
- The City Schools internal middle grades work group has been working closely with the portfolio team to examine schools in geographic clusters to continue to address the issue of smaller middle grades programs. Ten schools have been identified to implement the middle grades seminar model. The seminar resource packet has been completed and the training session content is being finalized. The training will be implemented with middle grades teachers in each of the ten schools during the week of August 27th. Various math data points for rising 6th graders were examined to identify eleven schools that will implement 6th grade honors programming for the 2018-19 school year. The 6th grade math teachers from these schools will participate in content and pedagogy training the week of August 6th. This training will continue throughout the school year.

Q1 – FY19

- City Schools partnered with the Baltimore Teachers Union, the Mayor's Office, and Live Baltimore to administer the B3 program for a second year this summer. The B3 advocates knocked on over 20,000 doors this year, focusing on areas with high numbers of student drop-outs in grades 6 through 9, areas with chronically under-enrolled Pre-K programs, areas with new 21st Century Schools, schools that are part of the 100% project, and schools that are Blueprint Intensive Learning Sites for Literacy. The 30 advocates, who were all teachers or school-based staff, advocated for Baltimore City Public Schools and had over 6,000 conversations with Baltimore community members by knocking on doors for four hours a day, 6 days a week for parts of the summer, and attending community events such as farmers markets. Additionally, Live Baltimore hosted eight events at different schools in the target zones throughout the month of August to encourage interested families to meet school staff and administration before the school year began. We are currently analyzing the data from this past summer to determine how the door knocking campaign may have influenced enrollment in the target door knocking areas.
- City Schools is continuing to review recommendations made by the enrollment task force through an internal advisory team. The team is building a prioritization matrix and is in the early stages of creating an implementation plan. Concurrently, City Schools is beginning to seek additional recommendations from parents and community members. At present, four public meetings have been scheduled throughout the district to solicit further input on improving enrollment and retention:
 - Thursday, October 25th – PCAB Meeting @ District Office
 - Wednesday, November 27th – Task Force Community Listening Session @ Arundel Elementary
 - Tuesday, December 4th – Task Force Community Listening Session @ Forest Park High School

- Monday, December 10th – Task Force Community Listening Session @ Commodore John Rogers
- The City Schools internal middle grades work group is continuing the implementation of three key initiatives to strengthen middle grades programming across the district. The team is working closely with the portfolio team to examine schools in geographic clusters to address the issue of smaller middle grades programs and move towards right sizing middle grades programs to support more robust programming. The Algebra Access for all initiative started with a cohort of ten schools implementing Honors 6th grade mathematics for the 2018-19 school year. Identified math teachers from these schools received five full days of content and pedagogy training in August 2018 and will receive monthly training to continue to support implementation of this accelerated curriculum. The seminar model has been implemented in five schools for the 2018-19 school year. Middle grades staff at each of these schools received training in the model and resources to support implementation. In addition to these three initiatives, the workgroup continues to review data and research on the middle grades and conduct stakeholder focus groups to determine next steps within and beyond the current district work in this area.

Q2 – FY19

- The City Schools internal middle grades work group is continuing the implementation of three key initiatives to strengthen middle grades programming across the district. The team worked closely with the portfolio team and recommended two school actions that will work to right size middle grades programming in the communities where the schools are located. Both actions were approved by the Board of School Commissioners in January 2019. The Algebra Access for All initiative continued monthly training with the math teachers from the cohort of ten schools that started this initiative in August 2018. These schools are currently implementing an accelerated 6th grade Math Honors course. The five schools that received training and resources for the middle grades seminar model continued implementation in the second quarter. The workgroup also conducted principal focus groups in Fall 2018 and is using this data to determine next steps within and beyond the current district work in this area.

Q3—FY19

- The City Schools internal middle grades work group continued the implementation of monthly teacher training for the Algebra Access for All initiative and reviewed various qualitative and quantitative data points to determine potential schools for the 2nd cohort of this program. The middle grades seminar schools continued to implement the seminar model and the team shared this initiative with potential Cohort 2 schools to allow the school teams time to get feedback from their middle school staff around potential implementation for next school year. Based on the principal focus group data and other district information, the work group is beginning to plan for a potential Middle Grades Principal Forum to provide best practices for supporting the academic and social-emotional needs of students in the middle grades.
- The Enrollment Task Force presented to the general public and the School Board on Tuesday, April 9, 2019. During this presentation, the public and Board was made aware of all current initiatives that have begun to take place in an effort to increase enrollment. The complete presentation can be found here:
<http://go.boarddocs.com/mabe/bcpss/Board.nsf/goto?open&id=BAW7VX72D6F6>

- Additionally, City Schools created a new Chief level position, the Chief Communications and Community Engagement Officer. The role will be tasked with many of the responsibilities set forth in the initial recommendations of the Task Force in creating a more robust relationship with the community at-large.

18. Reduce utility costs, maintain comprehensive database for all buildings, analyze data with goal of reducing consumption and achieving savings

- A comprehensive energy database is maintained by each City Schools facility and commodity. Data is routinely analyzed and audited with the goal of reducing consumption, finding errors and achieving savings.
- Lighting retrofit projects were performed using the latest technology light replacements to reduce consumption. The cost for these projects was offset by using available local utility rebates.
- Construction has begun for an off-site solar project to procure solar energy at a lower rate. In early 2018, City Schools will begin buying the electricity equivalent of about 3% of the total electricity portfolio and will continue for the next 20 years.

Q3 – FY18

- New lighting projects are being evaluated to retrofit gymnasiums and exterior lights with more efficient lights such as LED's to reduce utility costs, operations costs and energy costs.
- Off-site solar generation has begun. City Schools is anticipating data to evaluate savings.
- An energy reduction competition was held between 14 schools to educate students and staff about energy conservation and reduce costs.

Q4 – FY18

- Gymnasium lights have been switched to more efficient LED bulbs at one school. Nine of the light bulbs were free to City Schools through a local utility rebate program. Additional projects are under review for FY2019.
- Off-site solar electricity production is in place, with some savings despite lower traditional utility rates; exact calculations are underway.
- City Schools partnered with the Baltimore Energy Challenge, a City of Baltimore Civic Works program, to educate students at 12 schools in FY2018 about energy conservation and awareness; program will continue in FY2019. Schools also received \$ 1000 grants to execute energy conservation projects.

Q1 – FY19

- To further our efforts in the area of energy efficiency, City Schools recently hired a specialist with a twenty-year track record in creating and managing successful businesses and products in the clean energy space, including as a founder of SunEdison. She will use her expertise to investigate new ways for City Schools to monitor infrastructure

challenges and upgrade buildings using alternative financing mechanisms including energy savings agreements (beyond the 21st Century Schools program).

- Similarly, upon the departure of City Schools' CIO in the summer of 2018, the district hired an outside expert with significant background in public sector IT delivery to assess the district's information technology and related services, as currently provided to both central office and school-based staff. A key goal of the assessment is to determine whether City Schools has the appropriate technology, skills, practices and services to support its efforts at delivering a high-quality education to district students. This will be accomplished by examining how the technology strategic plan, budget and daily operations do or do not meet this goal. The assessment, which is nearing completion, will help the district executive team think long-term, as well as inform what skillset is needed in a CIO/CTO and set the direction of the department moving forward.

Q2 – FY19

- City Schools continues to maintain its utility database with an emphasis on increased monitoring of the online billing portal as it relates to daily utilities usage in new school buildings, with the goal of capturing energy waste.
- The district continues its work with the “building tune up program” and is currently exploring a pilot project in one facility whereby rebates may be available to update the school's building automation system so as to maintain utilities more efficiently.
- Gymnasium lights for six more schools were retrofitted this quarter with LED lights, with 100% of the material cost being eligible for rebate.
- The district is continuing its work to ensure schools' exterior lights are switched over to GPS dawn-to-dusk controls for minimizing the waste of electricity.

Q3 – FY19

- City Schools' Energy Office continues to maintain the utility database, including regular monitoring of online energy use and cost for accuracy of billing, as well as reviewing daily trends of electricity usage for newly constructed buildings to capture design and operations anomalies in terms of our energy efficiency model.
- Gymnasium lights for three more schools were retrofitted this quarter with LED lights, with 100% of the material cost being eligible for rebate.
- The district continues to work with our local rebate program provider to conduct a complete lighting replacement project in multiple school buildings whereby all bulbs will be converted to lower wattage LEDs and old fixtures will be replaced.
- The district is continuing to work on improving communications with schools about the need to reduce trash and increase recycling.

19. Work with MOU partners to implement uniformity in manufacturing systems installed in 21st Century buildings to help minimize maintenance costs

Q1 – FY18

- City Schools is engaged in ongoing discussions with the State of Maryland and our MOU partners regarding the feasibility of reducing the number of HVAC vendors being utilized for the 21st Century Buildings program in order to streamline service support for our new buildings.

Q2 – FY18

As a result of ongoing discussions with Maryland Stadium Authority regarding uniformity of vendors supplying HVAC systems in 21st Century buildings, MSA is exploring bulk purchasing procurement for systems.

Q3 – FY18

- Maryland Stadium Authority will move forward with bulk purchasing for Year 2 of Phase 1 of the 21st Century Building program. These include 17 schools in this phase. City Schools Operations staff will meet with MSA to determine Operations review and input in the development of the bulk purchasing procurement process and contract language.

Q4 – FY18

- City Schools Operations team is working with MSA to schedule meetings to develop equipment and control design specifications with a consultant in the fall. The specifications will be used to move forward and procure systems using bulk purchase methods.

Q1 – FY19

- The Maryland Stadium Authority is procuring a consultant to prepare HVAC equipment and control specifications to develop and issue a bulk purchasing RFP.

Q2 – FY19

- There is no change regarding this item at this time. The Maryland Stadium Authority is continuing to procure a consultant to prepare HVAC equipment and control specifications to develop and issue a bulk purchasing RFP.

Q3 – FY19

- There is no change regarding this item at this time. The Maryland Stadium Authority is continuing to procure a consultant to prepare HVAC equipment and control specifications to develop and issue a bulk purchasing RFP.

20. Continue discussions with City of Baltimore regarding OPEB and pension liability; report to state on outcome of pertinent discussions and potential financial implication

Q1 – FY18

- Financial leadership teams from City Schools and the City of Baltimore met in September 2017, along with their respective external auditors, to discuss the matter of the School Pension liability. City Schools stated its position on the pension liability issue, which is that City Schools complied with the stated requirements of Senate Bill 795 as it related to pension liability and that the liability currently resides with and should remain with Baltimore City government. The position of the Baltimore City finance team was

that the liability should be reported as a liability of City Schools. The external auditors provided comments for discussion as well. The meeting concluded with no movement in the position but a better understanding of each entity's finance team position.

The potential impact of assuming responsibility for the pension liability on the City Schools Financial Statements would have been a reduction in Net Position of \$93.1M (FY15). This reduction would eliminate the Unrestricted Net Position in the City Schools Financial Statements, which could affect the ability of City Schools to issue bonds or impact the interest rates for bond issuances. City Schools is the only Maryland Local Education Agency with the ability to issue bonds, stemming from Senate Bill 795.

Q2 – FY18

- While ongoing meetings regarding the OPEB issue have been conducted in the past, no additional meetings have occurred since the submission of the Joint Chairmen's Report in January 2017. Our collective efforts have been directed on the pension liability matter since it became an issue with the issuance of the Baltimore City FY 2015 financial statements in March 2017 and the related comments reflected therein.

Q3 – FY18

- Per the Q2 description above, there are no updates to report at this time.

Q2 – FY19

- City Schools complied with the requirements of GASB Statement No. 75 *Accounting and Financial Reporting for Postemployment Benefits other than Pensions (OPEB)* in our FY18 Comprehensive Annual Financial Report and reported that the OPEB plan is the responsibility of the City of Baltimore.

Q3 – FY19

- There are no updates to report at this time.

BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF REVENUES
GENERAL FUND
FOR THE SEVEN MONTHS ENDED JANUARY 2019
(IN THOUSANDS)

	FY 2019 Estimated Revenue	YTD January 2019 Actual Revenue	Balance
Revenue:			
State Grants	\$ 849,475	\$ 560,917	\$ 288,558
Baltimore City	278,412	167,615	110,797
Federal Grants	7,100	7,802	(702)
Other Revenue (including MSA revenue)	8,099	4,334	3,765
Investment Income, net	250	3,957	(3,707)
Other Financing Sources	25,063	-	25,063
Total Revenue	<u>\$ 1,168,399</u>	<u>\$ 744,625</u>	<u>\$ 423,774</u>

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY CATEGORY
GENERAL FUND
FOR THE SEVEN MONTHS ENDED JANUARY 2019
(IN THOUSANDS)**

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD January 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by category):						
Administration	\$ 62,066	\$ 7,486	\$ 69,552	\$ 32,601	\$ 12,843	\$ 24,108
Mid-Level Administration	66,244	1,124	67,368	42,694	2,821	21,853
Instruction	416,877	6,317	423,194	203,067	14,773	205,354
Special Education	186,702	9,293	195,995	85,282	17,448	93,265
Student Personnel Services	15,164	-	15,164	7,166	-	7,998
Student Health Services	82	-	82	-	-	82
Student Transportation	41,466	6,284	47,750	20,674	20,550	6,526
Operation of Plant	63,986	7,389	71,375	35,082	15,351	20,942
Maintenance of Plant	22,645	5,170	27,815	12,715	9,895	5,205
Capital Outlay	32,244	540	32,784	21,051	547	11,186
Debt Service	21,622	-	21,622	4,549	-	17,073
Fringe	242,243	-	242,243	125,952	(5)	116,296
Enrollment Adjustment	(2,942)	-	(2,942)	16	-	(2,958)
Total Expenditures	<u>\$ 1,168,399</u>	<u>\$ 43,603</u>	<u>\$ 1,212,002</u>	<u>\$ 590,849</u>	<u>\$ 94,223</u>	<u>\$ 526,930</u>

STATEMENT OF EXPENDITURES BY OBJECT
GENERAL FUND
FOR THE SEVEN MONTHS ENDED JANUARY 2019
(IN THOUSANDS)

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD January 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by object):						
Salaries and Wages	\$ 613,206	\$ -	\$ 613,206	\$ 306,625	\$ -	\$ 306,581
Fringe Benefits	233,930	-	233,930	125,952	-	107,978
Contract Services	178,082	30,176	208,258	91,075	72,776	44,407
Textbooks	935	163	1,098	522	275	301
Instructional Supplies	12,661	2,467	15,128	6,087	4,023	5,018
Other Supplies and Materials	11,315	2,727	14,042	5,606	4,063	4,373
Utilities	30,209	6,626	36,835	14,856	10,861	11,118
Other Charges	32,595	164	32,759	20,959	200	11,600
Property	3,920	1,074	4,994	2,079	2,104	811
Principal & Interest	21,622	-	21,622	4,549	-	17,073
Indirect Cost Recovery	(3,132)	-	(3,132)	(2,099)	-	(1,033)
Transfers	29,730	28	29,758	14,638	(258)	15,378
Structures and Improvements	1	178	179	-	179	-
Contingency Reserve	3,325	-	3,325	-	-	3,325
Total Expenditures	\$ 1,168,399	\$ 43,603	\$ 1,212,002	\$ 590,849	\$ 94,223	\$ 526,930

BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF REVENUES
SPECIAL REVENUE FUND
FOR THE SEVEN MONTHS ENDED JANUARY 2019
(IN THOUSANDS)

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD January 2019 Actual Revenue	Balance
Revenue:					
State Grants	\$ 1,232	\$ 587	\$ 1,819	\$ 936	\$ 883
Baltimore City	-	-	-	-	-
Federal Grants	110,775	45,658	156,433	54,843	101,590
Proceeds From Leases	-	-	-	-	-
Food sales and other charges	-	-	-	-	-
Investment Income, net	-	-	-	-	-
Other	338	726	1,064	468	596
Total Revenue	<u>\$ 112,345</u>	<u>\$ 46,971</u>	<u>\$ 159,316</u>	<u>\$ 56,247</u>	<u>\$ 103,069</u>

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY CATEGORY
SPECIAL REVENUE FUND
FOR THE SEVEN MONTHS ENDED JANUARY 2019
(IN THOUSANDS)**

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD January 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by category):						
Administration	\$ 4,544	\$ 1,432	\$ 5,976	\$ 2,851	\$ 70	\$ 3,055
Mid-Level Administration	4,898	5,748	10,646	3,243	1,965	5,438
Instruction	60,162	29,020	89,182	29,890	7,492	51,800
Special Education	14,595	5,052	19,647	8,416	2,128	9,103
Student Personnel Services	1,861	592	2,453	946	-	1,507
Student Health Services	3,000	-	3,000	-	410	2,590
Student Transportation	100	72	172	67	(8)	113
Operation of Plant	3	4	7	-	6	1
Maintenance of Plant	-	-	-	103	7	(110)
Capital Outlay	-	-	-	-	-	-
Debt Service	-	-	-	-	-	-
Food Services	44	54	98	62	5	31
Community Services	-	-	-	-	32	(32)
Fringe	23,138	4,997	28,135	10,669	(16)	17,482
Total Expenditures	<u>\$ 112,345</u>	<u>\$ 46,971</u>	<u>\$ 159,316</u>	<u>\$ 56,247</u>	<u>\$ 12,091</u>	<u>\$ 90,978</u>

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY OBJECT
SPECIAL REVENUE FUND
FOR THE SEVEN MONTHS ENDED JANUARY 2019
(IN THOUSANDS)**

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD January 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by object):						
Salaries and Wages	\$ 53,872	\$ 16,925	\$ 70,797	\$ 31,744	\$ -	\$ 39,053
Fringe Benefits	23,138	5,102	28,240	10,669	-	17,571
Contract Services	19,349	16,023	35,372	7,307	6,954	21,111
Supplies and Materials	4,548	5,026	9,574	4,059	3,739	1,776
Utilities and Other Charges	1,065	489	1,554	139	47	1,368
Property	85	78	163	-	(94)	257
Principal & Interest	-	-	-	-	-	-
Indirect Cost Recovery	4,016	1,189	5,205	2,099	-	3,106
Transfers	3,000	-	3,000	230	1,445	1,325
Unallocated Grants	1,319	1,456	2,775	-	-	2,775
Contingency Reserve	-	-	-	-	-	-
Out of County	1	-	1	-	-	1
Non - Public	1,952	683	2,635	-	-	2,635
Total Expenditures	<u>\$ 112,345</u>	<u>\$ 46,971</u>	<u>\$ 159,316</u>	<u>\$ 56,247</u>	<u>\$ 12,091</u>	<u>\$ 90,978</u>

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF REVENUES
FOOD SERVICES
FOR THE SEVEN MONTHS ENDED JANUARY 2019
(IN THOUSANDS)**

	FY 2019 Estimated Revenue	YTD January 2019 Actual Revenue	Balance
Revenue:			
State Grants	\$ 600	\$ 394	\$ 206
Baltimore City		-	-
Federal Grants	53,888	24,223	29,665
Proceeds From Leases	-	-	-
Food sales and other charges	82	-	82
Investment Income, net	-	-	-
Other	27	32	(5)
Total Revenue	\$ 54,597	\$ 24,649	\$ 29,948

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY CATEGORY
FOOD SERVICES
FOR THE SEVEN MONTHS ENDED JANUARY 2019
(IN THOUSANDS)**

	FY 2019 Appropriations	YTD January 2019 Actual	Encumbrances	Unencumbered Balance
Expenditures (by category):				
Administration	\$ -	\$ -	\$ -	\$ -
Mid-Level Administration	-	-	-	-
Instruction	72	50	20	2
Special Education	-	-	-	-
Student Personnel Services	-	-	-	-
Student Transportation	-	-	-	-
Operation of Plant	-	-	-	-
Maintenance of Plant	-	-	-	-
Capital Outlay	-	-	-	-
Debt Service	-	-	-	-
Food Services	42,955	22,443	11,624	8,888
Fringe	11,570	4,946	-	6,624
Total Expenditures	\$ 54,597	\$ 27,439	\$ 11,644	\$ 15,514

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY OBJECT
FOOD SERVICES
FOR THE SEVEN MONTHS ENDED JANUARY 2019
(IN THOUSANDS)**

	FY 2019 Appropriations	YTD January 2019 Actual	Encumbrances	Unencumbered Balance
Expenditures (by object):				
Salaries and Wages	\$ 18,849	\$ 10,472	\$ -	\$ 8,377
Fringe Benefits	11,571	4,946	-	6,625
Contract Services	734	239	279	216
Supplies and Materials	22,750	11,451	10,989	310
Utilities and Other Charges	178	96	35	47
Property	515	235	341	(61)
Principal & Interest	-	-	-	-
Indirect Cost Recovery	-	-	-	-
Transfers	-	-	-	-
Unallocated Grants	-	-	-	-
Contingency Reserve	-	-	-	-
Out of County	-	-	-	-
Non - Public	-	-	-	-
Total Expenditures	<u>\$ 54,597</u>	<u>\$ 27,439</u>	<u>\$ 11,644</u>	<u>\$ 15,514</u>

BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF REVENUES
GENERAL FUND
FOR THE EIGHT MONTHS ENDED FEBRUARY 2019
(IN THOUSANDS)

	FY 2019 Estimated Revenue	YTD February 2019 Actual Revenue	Balance
Revenue:			
State Grants	\$ 849,475	\$ 563,720	\$ 285,755
Baltimore City	278,412	188,333	90,079
Federal Grants	7,100	7,833	(733)
Other Revenue (including MSA revenue)	8,099	4,429	3,670
Investment Income, net	250	5,575	(5,325)
Other Financing Sources	25,063	-	25,063
Total Revenue	<u>\$ 1,168,399</u>	<u>\$ 769,890</u>	<u>\$ 398,509</u>

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY CATEGORY
GENERAL FUND
FOR THE EIGHT MONTHS ENDED FEBRUARY 2019
(IN THOUSANDS)**

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD February 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by category):						
Administration	\$ 61,900	\$ 7,486	\$ 69,386	\$ 37,297	\$ 12,980	\$ 19,109
Mid-Level Administration	66,279	1,124	67,403	48,252	2,665	16,486
Instruction	416,995	6,317	423,312	244,420	14,061	164,831
Special Education	186,668	9,293	195,961	103,274	16,067	76,620
Student Personnel Services	15,187	-	15,187	8,388	-	6,799
Student Health Services	82	-	82	-	-	82
Student Transportation	41,385	6,284	47,669	25,194	17,368	5,107
Operation of Plant	63,918	7,389	71,307	39,389	14,299	17,619
Maintenance of Plant	22,852	5,170	28,022	15,075	8,530	4,417
Capital Outlay	32,347	540	32,887	21,157	563	11,167
Debt Service	21,622	-	21,622	4,941	-	16,681
Fringe	242,106	-	242,106	141,264	(5)	100,847
Enrollment Adjustment	(2,942)	-	(2,942)	14	-	(2,956)
Total Expenditures	<u>\$ 1,168,399</u>	<u>\$ 43,603</u>	<u>\$ 1,212,002</u>	<u>\$ 688,665</u>	<u>\$ 86,528</u>	<u>\$ 436,809</u>

STATEMENT OF EXPENDITURES BY OBJECT
GENERAL FUND
FOR THE EIGHT MONTHS ENDED FEBRUARY 2019
(IN THOUSANDS)

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD February 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by object):						
Salaries and Wages	\$ 613,049	\$ -	\$ 613,049	\$ 354,785	\$ -	\$ 258,264
Fringe Benefits	233,795	-	233,795	141,264	-	92,531
Contract Services	178,388	30,176	208,564	115,264	66,900	26,400
Textbooks	958	163	1,121	549	262	310
Instructional Supplies	12,495	2,467	14,962	7,130	3,401	4,431
Other Supplies and Materials	11,652	2,727	14,379	6,372	3,955	4,052
Utilities	30,398	6,626	37,024	17,163	9,973	9,889
Other Charges	32,524	164	32,688	21,020	212	11,455
Property	3,594	1,074	4,668	2,327	1,904	437
Principal & Interest	21,622	-	21,622	4,941	-	16,681
Indirect Cost Recovery	(3,132)	-	(3,132)	(2,392)	-	(740)
Transfers	29,730	28	29,758	20,242	(258)	9,774
Structures and Improvements	1	178	179	-	179	-
Contingency Reserve	3,325	-	3,325	-	-	3,325
Total Expenditures	<u>\$ 1,168,399</u>	<u>\$ 43,603</u>	<u>\$ 1,212,002</u>	<u>\$ 688,665</u>	<u>\$ 86,528</u>	<u>\$ 436,809</u>

BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF REVENUES
SPECIAL REVENUE FUND
FOR THE EIGHT MONTHS ENDED FEBRUARY 2019
(IN THOUSANDS)

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD February 2019 Actual Revenue	Balance
Revenue:					
State Grants	\$ 1,232	\$ 587	\$ 1,819	\$ 982	\$ 837
Baltimore City	-	-	-	-	-
Federal Grants	110,775	45,658	156,433	62,421	94,012
Proceeds From Leases	-	-	-	-	-
Food sales and other charges	-	-	-	-	-
Investment Income, net	-	-	-	-	-
Other	338	726	1,064	694	370
Total Revenue	<u>\$ 112,345</u>	<u>\$ 46,971</u>	<u>\$ 159,316</u>	<u>\$ 64,097</u>	<u>\$ 95,219</u>

BALTIMORE CITY PUBLIC SCHOOL SYSTEM
 STATEMENT OF EXPENDITURES BY CATEGORY
 SPECIAL REVENUE FUND
 FOR THE EIGHT MONTHS ENDED FEBRUARY 2019
 (IN THOUSANDS)

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD February 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by category):						
Administration	\$ 4,544	\$ 1,432	\$ 5,976	\$ 3,412	\$ -	\$ 2,564
Mid-Level Administration	4,898	5,748	10,646	3,561	1,855	5,230
Instruction	60,162	29,020	89,182	33,861	12,533	42,788
Special Education	14,595	5,052	19,647	9,459	2,068	8,120
Student Personnel Services	1,861	592	2,453	1,104	-	1,349
Student Health Services	3,000	-	3,000	-	410	2,590
Student Transportation	100	72	172	70	(8)	110
Operation of Plant	3	4	7	-	6	1
Maintenance of Plant	-	-	-	103	7	(110)
Capital Outlay	-	-	-	-	-	-
Debt Service	-	-	-	-	-	-
Food Services	44	54	98	64	5	29
Community Services	-	-	-	-	32	(32)
Fringe	23,138	4,997	28,135	12,463	(16)	15,688
Total Expenditures	<u>\$ 112,345</u>	<u>\$ 46,971</u>	<u>\$ 159,316</u>	<u>\$ 64,097</u>	<u>\$ 16,892</u>	<u>\$ 78,327</u>

BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY OBJECT
SPECIAL REVENUE FUND
FOR THE EIGHT MONTHS ENDED FEBRUARY 2019
(IN THOUSANDS)

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD February 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by object):						
Salaries and Wages	\$ 53,872	\$ 16,925	\$ 70,797	\$ 36,027	\$ -	\$ 34,770
Fringe Benefits	23,138	5,102	28,240	12,463	-	15,777
Contract Services	19,349	16,023	35,372	8,254	11,851	15,267
Supplies and Materials	4,548	5,026	9,574	4,327	3,863	1,384
Utilities and Other Charges	1,065	489	1,554	153	63	1,338
Property	85	78	163	-	(82)	245
Principal & Interest	-	-	-	-	-	-
Indirect Cost Recovery	4,016	1,189	5,205	2,493	-	2,712
Transfers	3,000	-	3,000	380	1,197	1,423
Unallocated Grants	1,319	1,456	2,775	-	-	2,775
Contingency Reserve	-	-	-	-	-	-
Out of County	1	-	1	-	-	1
Non - Public	1,952	683	2,635	-	-	2,635
Total Expenditures	\$ 112,345	\$ 46,971	\$ 159,316	\$ 64,097	\$ 16,892	\$ 78,327

BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF REVENUES
FOOD SERVICES
FOR THE EIGHT MONTHS ENDED FEBRUARY 2019
(IN THOUSANDS)

	FY 2019 Estimated Revenue	YTD February 2019 Actual Revenue	Balance
Revenue:			
State Grants	\$ 600	\$ 525	\$ 75
Baltimore City		-	-
Federal Grants	53,888	28,047	25,841
Proceeds From Leases	-	-	-
Food sales and other charges	82	-	82
Investment Income, net	-	-	-
Other	27	33	(6)
Total Revenue	\$ 54,597	\$ 28,605	\$ 25,992

BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY CATEGORY
FOOD SERVICES
FOR THE EIGHT MONTHS ENDED FEBRUARY 2019
(IN THOUSANDS)

	FY 2019 Appropriations	YTD February 2019 Actual	Encumbrances	Unencumbered Balance
Expenditures (by category):				
Administration	\$ -	\$ -	\$ -	\$ -
Mid-Level Administration	-	-	-	-
Instruction	72	62	20	(10)
Special Education	-	-	-	-
Student Personnel Services	-	-	-	-
Student Transportation	-	-	-	-
Operation of Plant	-	-	-	-
Maintenance of Plant	-	-	-	-
Capital Outlay	-	-	-	-
Debt Service	-	-	-	-
Food Services	42,955	25,938	9,876	7,141
Fringe	11,570	5,657	-	5,913
Total Expenditures	<u>\$ 54,597</u>	<u>\$ 31,657</u>	<u>\$ 9,896</u>	<u>\$ 13,044</u>

BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY OBJECT
FOOD SERVICES
FOR THE EIGHT MONTHS ENDED FEBRUARY 2019
(IN THOUSANDS)

	FY 2019 Appropriations	YTD February 2019 Actual	Encumbrances	Unencumbered Balance
Expenditures (by object):				
Salaries and Wages	\$ 18,850	\$ 12,015	\$ -	\$ 6,835
Fringe Benefits	11,570	5,657	-	5,913
Contract Services	734	495	411	(172)
Supplies and Materials	22,780	13,156	9,110	514
Utilities and Other Charges	148	99	34	15
Property	515	235	341	(61)
Principal & Interest	-	-	-	-
Indirect Cost Recovery	-	-	-	-
Transfers	-	-	-	-
Unallocated Grants	-	-	-	-
Contingency Reserve	-	-	-	-
Out of County	-	-	-	-
Non - Public	-	-	-	-
Total Expenditures	\$ 54,597	\$ 31,657	\$ 9,896	\$ 13,044

BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF REVENUES
GENERAL FUND
FOR THE NINE MONTHS ENDED MARCH 2019
(IN THOUSANDS)

	FY 2019 Estimated Revenue	YTD March 2019 Actual Revenue	Balance
Revenue:			
State Grants	\$ 849,475	\$ 701,442	\$ 148,033
Baltimore City	278,412	209,050	69,362
Federal Grants	7,100	7,884	(784)
Other Revenue (including MSA revenue)	8,099	5,847	2,252
Investment Income, net	250	7,453	(7,203)
Other Financing Sources	25,063	-	25,063
Total Revenue	<u>\$ 1,168,399</u>	<u>\$ 931,676</u>	<u>\$ 236,723</u>

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY CATEGORY
GENERAL FUND
FOR THE NINE MONTHS ENDED MARCH 2019
(IN THOUSANDS)**

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD March 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by category):						
Administration	\$ 61,801	\$ 7,486	\$ 69,287	\$ 41,458	\$ 12,035	\$ 15,794
Mid-Level Administration	66,255	1,124	67,379	53,073	2,821	11,485
Instruction	417,071	6,317	423,388	274,822	13,823	134,743
Special Education	186,668	9,293	195,961	118,156	15,807	61,998
Student Personnel Services	15,187	-	15,187	9,703	-	5,484
Student Health Services	82	-	82	-	-	82
Student Transportation	41,454	6,284	47,738	27,783	16,022	3,933
Operation of Plant	63,900	7,389	71,289	45,350	12,772	13,167
Maintenance of Plant	22,899	5,170	28,069	17,336	5,875	4,858
Capital Outlay	32,278	540	32,818	26,273	557	5,988
Debt Service	21,622	-	21,622	5,492	-	16,130
Fringe	242,124	-	242,124	156,985	(5)	85,144
Enrollment Adjustment	(2,942)	-	(2,942)	14	-	(2,956)
Total Expenditures	\$ 1,168,399	\$ 43,803	\$ 1,212,002	\$ 776,445	\$ 79,707	\$ 355,850

**STATEMENT OF EXPENDITURES BY OBJECT
GENERAL FUND
FOR THE NINE MONTHS ENDED MARCH 2019
(IN THOUSANDS)**

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD March 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by object):						
Salaries and Wages	\$ 613,168	\$ -	\$ 613,168	\$ 404,818	\$ -	\$ 208,350
Fringe Benefits	233,813	-	233,813	156,985	-	76,828
Contract Services	178,870	30,176	209,046	124,542	60,891	23,613
Textbooks	935	163	1,098	575	294	229
Instructional Supplies	12,092	2,467	14,559	7,524	3,465	3,570
Other Supplies and Materials	11,782	2,727	14,509	6,945	4,363	3,201
Utilities	30,398	6,626	37,024	17,236	8,800	10,988
Other Charges	32,518	164	32,682	29,565	201	2,916
Property	3,461	1,074	4,535	2,567	1,772	196
Principal & Interest	21,622	-	21,622	5,493	-	16,129
Indirect Cost Recovery	(3,132)	-	(3,132)	(2,723)	-	(409)
Transfers	29,730	28	29,758	22,918	(258)	7,098
Structures and Improvements	1	178	179	-	179	-
Contingency Reserve	3,141	-	3,141	-	-	3,141
Total Expenditures	<u>\$ 1,168,399</u>	<u>\$ 43,603</u>	<u>\$ 1,212,002</u>	<u>\$ 776,445</u>	<u>\$ 79,707</u>	<u>\$ 355,850</u>

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF REVENUES
SPECIAL REVENUE FUND
FOR THE NINE MONTHS ENDED MARCH 2019
(IN THOUSANDS)**

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD March 2019 Actual Revenue	Balance
Revenue:					
State Grants	\$ 1,502	\$ 897	\$ 2,399	\$ 1,188	\$ 1,211
Baltimore City	-	-	-	-	-
Federal Grants	110,563	45,626	156,189	71,538	84,651
Proceeds From Leases	-	-	-	-	-
Food sales and other charges	-	-	-	-	-
Investment Income, net	-	-	-	-	-
Other	433	726	1,159	742	417
Total Revenue	<u>\$ 112,498</u>	<u>\$ 47,249</u>	<u>\$ 159,747</u>	<u>\$ 73,468</u>	<u>\$ 86,279</u>

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY CATEGORY
SPECIAL REVENUE FUND
FOR THE NINE MONTHS ENDED MARCH 2019
(IN THOUSANDS)**

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD March 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by category):						
Administration	\$ 4,566	\$ 1,594	\$ 6,160	\$ 3,808	\$ -	\$ 2,352
Mid-Level Administration	5,061	5,743	10,804	4,345	1,447	5,012
Instruction	60,339	29,035	89,374	38,665	13,526	37,183
Special Education	14,520	5,403	19,923	10,639	1,990	7,294
Student Personnel Services	1,859	651	2,510	1,271	-	1,239
Student Health Services	3,000	-	3,000	-	410	2,590
Student Transportation	113	74	187	74	(2)	115
Operation of Plant	3	4	7	-	6	1
Maintenance of Plant	-	309	309	103	7	199
Capital Outlay	-	-	-	-	-	-
Debt Service	-	-	-	-	-	-
Food Services	44	54	98	71	12	15
Community Services	-	-	-	-	32	(32)
Fringe	22,993	4,382	27,375	14,492	(16)	12,699
Total Expenditures	<u>\$ 112,498</u>	<u>\$ 47,249</u>	<u>\$ 159,747</u>	<u>\$ 73,468</u>	<u>\$ 17,412</u>	<u>\$ 68,867</u>

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY OBJECT
SPECIAL REVENUE FUND
FOR THE NINE MONTHS ENDED MARCH 2019
(IN THOUSANDS)**

	FY 2019 Current Appropriations	Carryover Appropriations	Total Appropriations	YTD March 2019 Expenditures	Encumbrances	Unencumbered Balance
Expenditures (by object):						
Salaries and Wages	\$ 53,779	\$ 17,048	\$ 70,827	\$ 41,200	\$ -	\$ 29,627
Fringe Benefits	22,994	4,487	27,481	14,493	-	12,988
Contract Services	19,181	16,796	35,977	9,467	12,176	14,334
Supplies and Materials	4,906	5,051	9,957	4,657	4,273	1,027
Utilities and Other Charges	930	390	1,320	188	64	1,068
Property	85	78	163	-	(82)	245
Principal & Interest	-	-	-	-	-	-
Indirect Cost Recovery	4,038	1,351	5,389	3,083	-	2,306
Transfers	3,000	-	3,000	380	981	1,639
Unallocated Grants	1,824	1,413	3,037	-	-	3,037
Contingency Reserve	-	-	-	-	-	-
Out of County	1	-	1	-	-	1
Non - Public	1,960	635	2,595	-	-	2,595
Total Expenditures	<u>\$ 112,498</u>	<u>\$ 47,249</u>	<u>\$ 159,747</u>	<u>\$ 73,468</u>	<u>\$ 17,412</u>	<u>\$ 68,867</u>

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF REVENUES
FOOD SERVICES
FOR THE NINE MONTHS ENDED MARCH 2019
(IN THOUSANDS)**

	FY 2019 Estimated Revenue	YTD #REF! Actual Revenue	Balance
Revenue:			
State Grants	\$ 600	\$ 525	\$ 75
Baltimore City		-	-
Federal Grants	53,888	33,079	20,809
Proceeds From Leases	-	-	-
Food sales and other charges	82	-	82
Investment Income, net	-	-	-
Other	27	37	(10)
Total Revenue	\$ 54,597	\$ 33,641	\$ 20,956

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY CATEGORY
FOOD SERVICES
FOR THE NINE MONTHS ENDED MARCH 2019
(IN THOUSANDS)**

	FY 2019 Appropriations	YTD #REF! Actual	Encumbrances	Unencumbered Balance
Expenditures (by category):				
Administration	\$ -	\$ -	\$ -	\$ -
Mid-Level Administration	-	-	-	-
Instruction	72	62	20	(10)
Special Education	-	-	-	-
Student Personnel Services	-	-	-	-
Student Transportation	-	-	-	-
Operation of Plant	-	-	-	-
Maintenance of Plant	-	-	-	-
Capital Outlay	-	-	-	-
Debt Service	-	-	-	-
Food Services	42,955	29,727	7,649	5,579
Fringe	11,570	6,490	-	5,080
Total Expenditures	\$ 54,597	\$ 36,279	\$ 7,669	\$ 10,649

**BALTIMORE CITY PUBLIC SCHOOL SYSTEM
STATEMENT OF EXPENDITURES BY OBJECT
FOOD SERVICES
FOR THE NINE MONTHS ENDED MARCH 2019
(IN THOUSANDS)**

	FY 2019 Appropriations	YTD #REF! Actual	Encumbrances	Unencumbered Balance
Expenditures (by object):				
Salaries and Wages	\$ 18,850	\$ 13,711	\$ -	\$ 5,139
Fringe Benefits	11,570	6,490	-	5,080
Contract Services	734	349	356	29
Supplies and Materials	22,780	15,393	6,939	448
Utilities and Other Charges	148	101	33	14
Property	515	235	341	(61)
Principal & Interest	-	-	-	-
Indirect Cost Recovery	-	-	-	-
Transfers	-	-	-	-
Unallocated Grants	-	-	-	-
Contingency Reserve	-	-	-	-
Out of County	-	-	-	-
Non - Public	-	-	-	-
Total Expenditures	\$ 54,597	\$ 36,279	\$ 7,669	\$ 10,649

CITY SCHOOLS' TRANSPORTATION WORKGROUP REPORT

Prepared for Financial Recovery Plan Review

April 8, 2019

Office of the Chief Operating Officer

Transportation Workgroup Directive

In December 2016, City Schools announced Education Resource Strategies had conducted an analysis of the fiscal 2018 budget to find a \$130 million structural deficit. During the 2017 legislative session the Maryland General Assembly passed House Bill 684, which included funding to address the structural deficit. A condition of the legislation required that the Baltimore City Public Schools Board of School Commissioners (School Board) develop a financial recovery plan. In relation to transportation, the plan required the School Board to “Convene a working group with outside partners to explore potential solutions to reduce transportation costs over the long term”. In January of 2018, City Schools formed the Transportation Workgroup to develop strategies to address transportation challenges by focusing on higher levels of efficiencies and cost savings.

This report is a summary of the following:

- Overview of City Schools' student transportation program
- Workgroup structure and participation
- Review of the workgroup topics and corresponding recommendations

Overview of City Schools' Office of Student Transportation (OPT) Program

Student transportation is a complex system with a mission to provide safe, high quality and timely transportation for students requiring services. To accomplish this mission City Schools employs a mix of yellow buses operated by internal City Schools transportation staff; yellow buses and taxi cab services provided by external vendors; and public transportation provided to approximately 26,000 to 28,000 students each day. Figure 1 provides a snapshot of data and statistics from a day in City Schools' transportation from school year (SY) 2017-2018. This snapshot shows that on a typical day in SY 2017-18 approximately 8,000 students were transported via 336 buses and 230 taxi cabs, which covered approximately 35,000 miles of travel. In addition, the Maryland Transportation Administration (MTA) provided transportation services to approximately 18,000 to 20,000 City Schools' students. To further understand the complexity and challenges of City Schools transportation, it is important to understand the type of services provided, rationale for why students are transported, and funding that the program receives in order to provide transportation services to students.

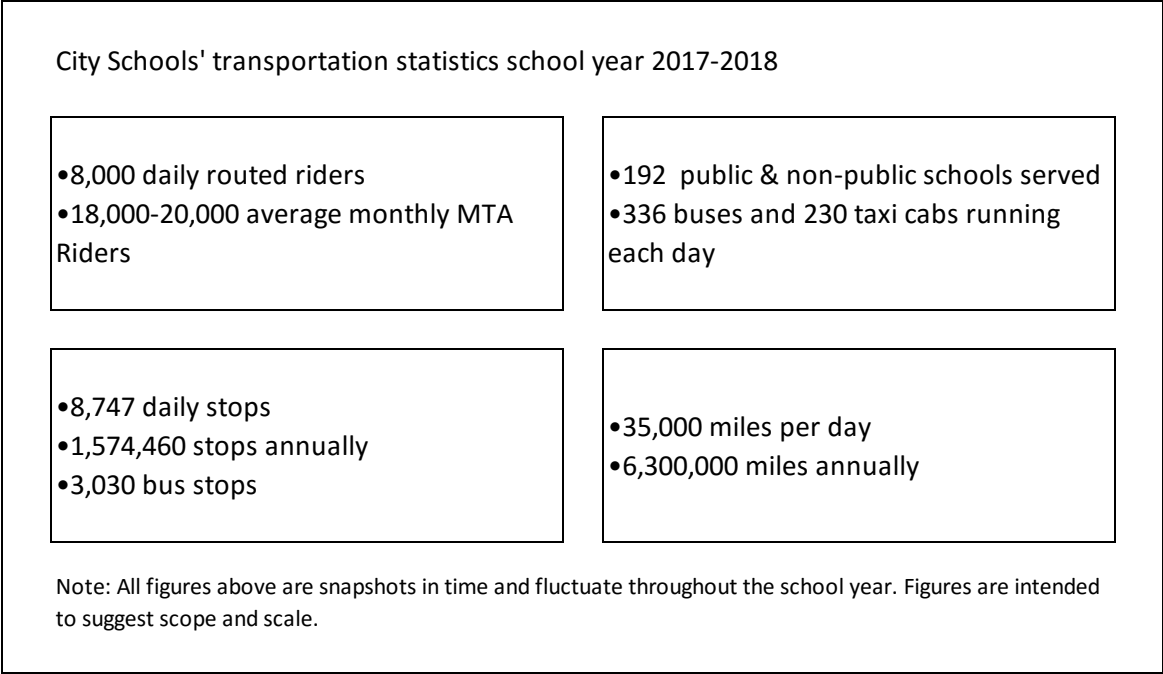


Figure 1: City Schools' transportation statistics snapshot

Transportation Services. City Schools uses four types of transportation services: corner-to-corner yellow bus, specialized yellow bus, taxi cab and public transportation. Figure 2 provides details for yellow bus and taxicab services which include: corner-to-corner transportation and specialized services (yellow bus and taxi cab). Corner-to-corner transportation service is provided to a student who is picked up on a neighborhood street corner by a yellow bus. For this service, a bus driver will pick up students at a corner stop in a neighborhood and transport those students to one specific school. Specialized transportation service is front door service provided to a student. For this service, a bus driver or taxi cab driver will pick up the student at their residence and take them to their respective school. A student receiving specialized services may travel a longer distance than a student who is riding on a bus or assigned to a taxi that has multiple stops for more than one student. This is because although they are receiving specialized services, the taxi cab or yellow bus may have more than one stop and may have travel to multiple schools. The last type of service not included in Figure 2 is MTA services, which is a mode of public transportation that has various scheduled stops and select supplemental stops. The recommendations in this report will focus on yellow bus and taxi cab modes of transportation which include corner-to-corner and specialized service routes.

Two types of transportation services provided with yellow bus or taxi cab

<u>Corner-to-Corner</u>	<u>Specialized</u>
•Pickup and drop off at a bus stop	•Pickup and drop off at home
•Fewer stops	•Many stops
•School-wide service for eligible students	•Service is for specific students
•More students on a bus	•Fewer students on a bus
•Shorter travel distances	•Longer travel distances

Figure 2 Descriptions of corner-to-corner and curb-to-curb transportation services

Student Classifications for receiving transportation. City Schools provides specialized transportation services for: students with designated Individualized Educational Programs (IEP), students with a Section 504 Plan, students who are homeless or in foster care, and students eligible to receive transportation as part of their English Speakers of Other Languages (ESOL) program. Other students transported by City Schools are students that live beyond one and half mile walking distance from their respective school; students who live in an area designated as a non-safe zone; students who are temporarily attending a swing space school due to their home school being under construction; or students identified by the CEO designee as requiring transportation.

Figure 3 shows the number of students transported in FY16-18 on specialized and corner to corner routes and the reason they received transportation. Approximately 5,000 students were transported due to specialized legal service requirements and 2,000 students were transported on a corner-to-corner route. Due to school relocations and closing schools contributing to larger school zones, the demand for corner to corner transportation services is rising.

Students transported: specialized and corner-to-corner			
Specialized transportation: student counts by transportation reason			
Transportation Reason	Fiscal 2016	Fiscal 2017	Fiscal 2018
Individualized Education Program	2,599	2,492	2,572
Homeless	1,394	1,484	1,477
Pre-school	414	394	356
Medical	185	236	235
English Learners	221	158	141
Other	101	79	54
Section 504 Plan	44	46	36
Ride w/ Sibling	-	19	96
Foster Care	-	36	43
Alternative Placement	16	43	11
	4,974	4,987	5,021
Corner-to-Corner: student counts	2,000	2,000	2,000
Total students transported: specialized and corner-to-corner transportation	6,974	6,987	7,021

Figure 3 Transportation reasons with counts of students.

Funding. An analysis conducted by the Department of Legislative Services in 2016, estimated that City Schools was underfunded by \$290 million, while the APA study on school funding found City Schools was underfunded by \$358 million a year. In the face of funding challenges, City Schools has simultaneously seen increases in the number of students requiring specialized and corner-to-corner services. The increase in the number of students requiring transportation can be partially attributed to the large number of schools that City Schools has closed over the past several years. The closing of schools has increased the number of students eligible for transportation due to the distance from a student’s home to their zoned school or to a swing space school in which they are temporarily located at. Other increases in demand can also be attributed to the increase in the homeless student population. Due to the increased demand for transportation, transportation services are being provided through contractor services. As a result, City Schools has been unable to invest in structural improvements such as the acquisition of more buses, the increase in hiring or more in-house staff to include bus drivers, aides) and staff to monitor contract and safety compliance

Figure 4 shows the annual cost to provide transportation to students who received specialized and corner to corner transportation between FY2016-18. The cost to provide specialized transportation is a large part of City Schools’ OPT budget. Figure 5 compares City Schools cost to provide these same services with other Maryland LEAs, the average cost per bus and per pupil are relatively low. Limited funding to provide specialized services transportation has strained operations putting a need on internal staff to provide oversight for financial and contractual monitoring. To supplement, OPT has also employed the use of technology, such as GPS systems, to assist with oversight and monitoring.

City Schools' actual costs for specialized and corner-to-corner transportation			
	Fiscal 2016	Fiscal 2017	Fiscal 2018
Total Actual Operating Costs-less MTA	\$ 41,420,123	\$ 41,893,249	\$ 41,151,150
Students transported	6,974	6,987	7,021
Average per student costs	\$ 5,939	\$ 5,996	\$ 5,861

Figure 4 City Schools' annual spending and average per student transportation costs.

Comparisons of specialized transportation, does not include corner-to-corner transportation				
LEA	Specialized bus routes	Students receiving specialized transportation	Average annual cost per bus route ¹	Average cost per pupil ²
Anne Arundel County Public Schools	96	1387	\$ 93,588	\$ 6,477
City Schools FY17	296	4987	\$ 102,329	\$ 7,723
Montgomery County Public Schools FY17	482	5607	\$ 118,803	\$ 10,213
Baltimore County Public Schools FY17	206	3647	\$ 120,939	\$ 9,517
Carroll County Public Schools	74	779	\$81,810 in county \$105,406 out of county	\$5,708 in county \$23,424 out of county

¹City Schools' count of students who use specialized yellow bus was 3,700 in FY17.
FY17 total expenses (\$46,080,942) less MTA, Taxi Cab, and Corner-to-Corner expenses(\$15,791,509)=specialized yellow bus transportation expenses(\$30,289,433)/specialized routes(296)

²FY17 total expenses (\$46,080,942) less MTA and Corner-to-Corner expenses(\$7,567,862)=specialized transportation expenses(\$38,513,079)/students(4987)

Figure 5 Fiscal 2017 comparisons of some Maryland public school systems specialized transportation.

In review of the OPT program, the Transportation Workgroup’s dual goal was to explore ways to reduce City Schools’ transportation financial costs and provide safe transportation with high standards of service. While limited recommendations were identified that would result in cost savings, the workgroup identified opportunities for improvements that could increase efficiency and improve the quality of service while recognizing the complexity of the work.

Summary of Workgroup participants and Topics

The workgroup was comprised of various stakeholders who represented: state, local and district level organizations; advocacy and university groups; private entities; nonprofit organizations; and internal district office staff. The group was strategically diverse to ensure a broad representation of stakeholders who could provide expertise and varying perspectives for improving efficiency and student transportation services offered by City Schools. Members of the workgroup included:

- Sheila Billups - Special Education Citizen’s Advisory Committee
- Monisha Cherayil - Public Justice Center

- Angel Lewis - former Principal of Claremont School
- Kamala Carnes - Principal of Joseph C. Briscoe Academy
- Celeste Chavis, Ph.D., P.E. - Associate Professor, Morgan State University
- Marc Stein, Ph.D., - Associate Professor, School of Education Johns Hopkins University
- Leon Langley - Assistant Director of Montgomery County Public Schools' Department of Transportation
- Michael J. Hardesty - Director of Carroll County Public Schools' Department of Transportation
- Don Swift - Administrative Specialist Anne Arundel County Public Schools Department of Transportation
- Gabriel D. Rose - Director of Pupil Transportation Maryland State Department of Education
- Henry Kay - Director, Rail/Transit RK&K
- Patrick J. McMahon - Senior Planner Maryland Transit Administration
- Jacinta Hughes - Director of Pupil Transportation City Schools
- Robbin Marshall - Assistant Director of Pupil Transportation City Schools
- Lynette K. Washington, Ph.D., - Interim Chief Operations Officer City Schools
- Nichole Stewart, Ph.D., - Director Schools and Facilities Planning City Schools
- John M. Land - Executive Director of Operations City Schools
- Angela Parker - Educational Specialists City Schools

Meeting Topics

Between January to November 2018, six meetings were held at City Schools' headquarters. The meetings consisted of various presentations provided by: City Schools' staff who provided context of the OPT program and challenges, advocacy groups who presented City Schools' student experiences, and lastly, other LEAs and urban districts who presented innovative solutions to address their challenges. Presentations were followed with dialogue to support and generate potential strategies in response to identified challenges. Below are the topics that were presented and covered in the meetings. At the end of the sessions, the work group reconvened on November 28, 2018 to develop recommendations.

January 22, 2018 - Purpose of the Transportation Workgroup and an overview of City Schools' yellow bus and specialized services transportation. Presentation materials can be found in Appendix A ([link](#)).

February 27, 2018 - Presentation of information on students' experiences and processes for supporting the education of homeless students presented by Monisha Cherayl of the Public Justice Center Presentation materials can be found in Appendix B ([link](#)).

April 26, 2018 - Presentation of the student transportation programs, challenges and initiatives implemented for improvements by transportation Directors from Baltimore County and the District of Philadelphia Public Schools presented. Presentation materials can be found in Appendix C ([link1](#), [link2](#)).

May 31, 2018 - Presentation and overview on the approved school bus types to transport students presented by the Maryland State Department of Education Director of Pupil Transportation. Presentation materials can be found in Appendix D ([link](#)).

June 28, 2018 - 1. Presentation and Q&A on the analysis of the geographic location of City Schools programs and implications of processes to inform placement decisions for students with disabilities presented by City Schools' Director of Planning Dr. Nichole Stewart. Presentation materials can be found in Appendix E ([link1](#), [link2](#)).

2. Presentation and Q & A on City Schools' program placement decisions for students with disabilities and the Individualized Educational Plan process for the transportation of students with disabilities presented by City Schools Educational Specialist Angela Parker.

3. Q & A with families. What are family experiences with City Schools' Transportation?

Guest Panel:

- Sheila Billups, Special Education Citizens' Advisory Committee
- Mr. Haywood, family representative of a student with a disability
- Ms. Chapman, family representative of a student with a disability
- Ms. Carmona, family representative of a student with a disability

4. Q & A with guest panel. What is done to provide transportation for a student with disabilities?

Guest Panel:

- Nick Shockney, Director of Special Education, Carroll County Public Schools
- Michael Hardesty, Director of Transportation Services Department, Carroll County Public Schools
- Kenny West, Assistant Director of the Office of Transportation, Baltimore County Public Schools
- Brenda Borisevic, Special Needs Transportation Assistant, Baltimore County Public Schools
- Brenda Corbett-Beard, PRIDE Lead, Moravia Park Elementary School, City Schools
- Caitlin McKee, Special Educator, Moravia Park Elementary School, City Schools
- Ireneo Rios, Educational Associate, The Baer School, City Schools
- Angela Parker, Educational Specialist, City Schools
- Jacinta Hughes, Director of the Office of Pupil Transportation, City Schools

November 28, 2018 – The workgroup reconvened to review discussions, identify and develop options, and review draft recommendations. The following draft recommendations were presented to the workgroup at this meeting for dialogue and refinement.

Summary of Challenges and Proposed Recommendations

- **CHALLENGE:** Students who require specialized transportation services tend to travel long distances with travel time that may be above 60 minutes to reach school programs that accommodate their specialized services.
 - **RECOMMENDATION 1 - ACCESS TO OPTIONS AND INFORMED CHOICE:** Research the feasibility of distributing programs across the city to reduce student travel time; review the placement decision process to ensure students are attending programs that meet their needs and are close to their residences; and provide travel information for families who are selecting schools so that they can make informed decisions about program selection for their child.

- **CHALLENGE:** Negative cost implications resulted from the increased demand for transportation services throughout the school year and the significant increase in the homeless population. Challenges are further exacerbated with ongoing bus driver shortages leading to an increased reliance on taxi cab services that further drives up costs.
 - **RECOMMENDATION 2 - NEGOTIATE CAB CONTRACTS:** Negotiate with taxi cab companies to lower rates.

- **CHALLENGE:** Buses are not used at optimal capacity as students are transported to a range of schools in various parts of the city that have different arrival and departure times. As a result, buses designed to hold approximately 40 students are often transporting only 7 to 10 students.
 - **RECOMMENDATION 3 - REVIEW BELL SCHEDULES:** Reduce the number of different bell schedules to reduce costs through more efficient routes with increased ridership per bus.

- **CHALLENGE:** Contractors are consistently late and it's difficult for OPT to track lateness beyond reconciling with GPS systems (time lag) and school reporting.
 - **RECOMMENDATION 4 - REVIEW BUS CONTRACTS AND SCAN SYSTEM:** Restructure the yellow bus contract to improve invoice monitoring and develop proposal for a bus driver and attendant school-based scan system.

- **CHALLENGE:** OPT has ongoing staffing challenges that constrain capacity to backfill service gaps or ensure oversight and monitoring of a large contractual portfolio. Additional in-house staffing is needed to backfill lateness or bus driver call outs and enhance capacity for monitoring and oversight.

- **RECOMMENDATION 5 - FIVE YEAR STRATEGIC PLAN:** Develop a five-year strategic plan that lays out resource needs, administration structure and improvements to City Schools’ transportation services.

Following are detailed recommendations and OPT considerations for implementation.

RECOMMENDATION 1 - ACCESS TO OPTIONS AND INFORMED CHOICE

Challenges: City schools’ bus capacity, travel distances and travel times may improve by ensuring students attend school programs closest to their residence. City Schools’ Director of Planning, Dr. Nichole Stewart, presented findings to the workgroup from an analysis of citywide program locations, enrollment and student residences. Three citywide programs were analyzed and the findings showed that more than half of the enrolled elementary students did not attend the program closest to their residence and their average commute distance to their current program was farther than the program closest to their residence (Figure 6).

Program	Number of Students	Percentage of students who do not attend closest program	Average distance to current program	Average distance to closest program
ED Pride	97	51%	3.30	1.77
Life Skills	108	56%	3.48	2.21
PAL	122	63%	2.87	1.87

Figure 6 Elementary grade citywide program enrollment and students not attending the closest program.

It is assumed that if students attend a program closer to their residence, this may result in a reduction in the distance that a bus travels, therefore improving students’ travel time. Fewer students traveling across the city from the same neighborhood to different school programs may also increase the number of students on a bus to a more optimal level. The challenge is that the student may not have a program option close to their home to accommodate their specific IEP requirements. This change would require the availability of program options which would require analyses to determine geographic needs as well as resources to support the recommended program and staffing.

At the middle and high school grades, City Schools offers school choice which impact bus capacity and travel time. Families make school choices while weighing the best interests of their child. Across the district, middle and high school students often leave their neighborhoods for their selected choices and travel longer distances. The workgroup solicited feedback from families of students with disabilities. One mother explained that their family’s decision was based on the capacity of the program to implement their child’s IEP; which was not offered by a program closer to their residence. This suggests that the quality of a program influences a families’ decision and selection of the school for their child. School choice allows families of students with disabilities to meet their most pressing educational needs.

City Schools’ Department of Planning found that middle school students who attended six citywide Pride programs were enrolled in a program further from their residence than a closer

program (Figure 7). As elementary school students, middle and high school students who traveled on yellow bus or taxi cab to their citywide program of choice tend to travel further.

Program	Number of Students	Average distance to current program	Average distance to closest program
Middle School Pride	112	3.83	2.03

Figure 7 Average travel distance for middle school students enrolled in six Pride programs.

Recommendations: Continue to review student placement processes to ensure that, when possible, students are being placed in programs that meet their needs and are nearest to their residence. This should be inclusionary of the effect that program quality has on informing a family’s decision. Research the feasibility, costs and benefits of adding more centrally located programs closer to where students live. Provide travel information for families to use when making decisions about the school and program their child plans to attend. It is assumed that reducing the distance a bus travels allows the bus to operate more efficiently; however, more analysis is needed.

Timeframe: Intermediate- Long term (on-going analysis)

Constraints: Availability of programs that are accessible to students and the challenges and resources necessary to add additional high-quality programming to support students near their residences may offset any potential transportation savings or benefits of such a proposal.

RECOMMENDATION 2 – NEGOTIATE CAB CONTRACTS

Challenges: OPT has two main issues related to cab contracts which include: the cost of providing taxi cab transportation and the number of students assigned to taxi cabs. Limited yellow bus fleet capacity and bus driver shortages are contributing factors that also increase the assignment of students on taxi cabs. The current yellow bus fleet are larger buses with average capacities of 40-60 students per bus, however, with students traveling to various schools from different geographic areas, only 7 to 10 students are assigned to each bus for a specific route. Any additional student(s) added to a route increases student ride time. OPT’s use of taxi cabs often keeps down the travel time and distance for both the student in the taxi as well as for students assigned on a bus. Taxi cab usage also addresses late assignments after the school year begins, specifically for homeless students. In addition, during driver shortages, students not assigned to a bus route are assigned to taxi cab services.

OPT’s reliance on taxi cabs for supplemental services presents safety concerns for students, such as injury in an accident and risk of mistreatment of students with disabilities by drivers or student passengers. Maryland State Department of Education (MSDE) has communicated clear concerns to City Schools regarding the overuse of taxi cabs due to safety reasons, though MSDE has allowed it due to the challenges listed above.

The School District of Philadelphia’s (SDP) General Manager of Transportation Services, Marvin Lee, presented to the workgroup SDP’s challenges, success and lessons learned. He described

that SDP negotiated a new taxi cab contract with a reduction in cost from the previous contract. Changes in Philadelphia’s market, due to Uber and Lift, were leveraged to negotiate a less expensive contract. Similar market changes exist in Baltimore; therefore, it is recommended that City Schools consider renegotiation of the taxi contract to reduce the daily rates to transport students.

Recommendations: Renegotiate lower taxi cab costs. A consideration is to develop a ride sharing program for students who travel to the same school in a single taxi cab. Staff from the Office of the Chief Operating Officer will engage the Office of Legal Counsel and the Procurement Department to determine the best way to engage taxi cab companies in negotiations designed to lower what they charge City Schools to transport students.

Timeframe: Intermediate

Constraints:

Limited Competition. One taxi company transports most students assigned to taxi cab services, this factor primarily weakens City Schools’ ability to negotiate lower rates and affords the taxi company a position of strength to set terms.

Public Service Commission (PSC). The PSC governs taxi cab rates for the State of Maryland. Mileage, wait time and an 11.5% administrative fee are the factors that total the cost of a taxi cab trip. To change these factors will require action by the Maryland General Assembly. During the 2015 Legislative Session City Schools attempted to reduce the administrative fee to 4.5%. The bill did not make it out of committee. In response to the attempt to reduce the administrative fee, the Yellow Taxi Cab Company reduced the wait time factor. This helped to reduce daily rates; however, taxi cab costs continue to rise with growing student ridership demands.

RECOMMENDATION 3 – REVIEW BELL SCHEDULES

Challenges: City schools’ bus capacity may improve by reviewing current district-wide bell schedules. City Schools has different bell times that impact transportation arrival and departure schedules: 10 for morning arrivals and 26 for afternoon departures. The variation of bell schedules affects bus capacity by limiting the number of buses that can service more than one school. Schools with morning bell schedules between 7:45 am and 8:15 am represent a larger portion of schools receiving students transported through OPT program. Seventy percent of students who receive specialized transportation are scheduled to arrive during this thirty-minute window. As a result, the imbalance between the numbers of students transported during earlier and later times impacts bus capacity.

In addition, some schools operate on an intermittent schedule where students dismiss early on alternate days. This schedule adds 16 additional afternoon bell schedules than the morning. The purpose of these alternate schedules is to create time and space for teachers to engage in regular professional learning – the presence of which is a hallmark of high performing districts. However, the imbalance of schedules presents challenges for the OPT staff to route buses for greater efficiency with additional route needs that are not consistent each day.

Recommendations: Reduce bell schedules, streamline dismissal times and stagger schedules for buildings based on geographically bounded area. Staff from the Office of the Chief Operating Officer and the OPT will procure a consultant to conduct a bell schedule study and recommend options to improve bus capacity through streamlined schedules.

Workgroup members, with experience in system wide bell schedule changes, advised City Schools to engage school communities one year in advance of the year when bell schedules are to change for a large portion of schools.

The purpose of the bell study is to determine if staggering bell schedules for buildings located within a geographically bounded area will increase bus capacity. If schools are located within fifteen to thirty minutes of each other with the same start time, it is assumed that this schedule limits the number of schools a bus can service. If, on the other hand, buildings located within fifteen to thirty minutes of each other are scheduled to start and end at different times, it is assumed that buses may service two or three schools by staggering times for bus pick up and drop offs between schools.

Timeframe: Intermediate Term

Constraints: OPT's limited ability to predict and manage where students with specialized needs will be placed. Changes may be identified for efficiency but changes in student enrollment and district wide program needs may cause some programs to move to different schools impacting the new scheduling.

RECOMMENDATION 4 – REVIEW BUS CONTRACTS AND SCAN SYSTEM

Challenges: City Schools' OPT must validate yellow bus contractor invoices to make payments for services. Over the past 10 years, the terms of the yellow bus contract included payment to vendors at a base rate and any additional funds over the base rates were determined by the distance of routes for each day a bus operated. These rates were awarded through a competitive bid procurement process. Daily base rates were paid for the first four and half hours, and the first sixty miles a bus operated. When a bus exceeded these two parameters, vendors were paid per mile and per hour rate for the distance and time over the base of four and half hours, and sixty miles. Contractor invoices included the daily time and distance a bus operated. Over the course of a school year, this required documentation which resulted in 50,000 to 55,000 single invoice entries including both time and distance of bus travel for one OPT staff person to review for payment.

Validation of time by OPT staff of vendor bus operations is another challenge. The route plan data are set up for as many buses as possible to operate on a 4.5 hours schedule. However, in an analysis of 2017 GPS data for 52 buses on 30 different days, the average run time was 7:05 hours. It was determined by staff that the route plan data was missing factors that affect the time a bus travels. The plan data did not include the time a bus driver waits to drop off and pick up a student. Many buses service schools for students with disabilities, which may require an additional 40 to 60 minutes daily to drop off and pick up students at a school. Another factor that was missing from the route plan is the time that a bus driver waits in traffic delays or inclement weather, which presents challenges for staff to validate an invoice.

City Schools cannot systematically validate all drivers' arrival to a school, without personnel at each school documenting drop-off and pick-up times. Philadelphia's General Manager of Transportation Services, in his presentation to the workgroup, indicated that Philadelphia will implement a scan system where drivers will scan an ID card at a school upon bus arrival. This system will provide a time stamp to validate vendor invoices.

Recommendations: Develop standard operating procedures for the validation and payment of invoices and revise the contract language in the current contract to improve oversight and monitoring. Assess Philadelphia's implementation of a driver scan system to determine if the system will address City Schools' changes and develop a proposal for a scan system for City Schools.

Timeframe: In process – Short term

On July 24, 2018, the Board of School Commissioners approved a new yellow bus contract. This contract was restructured for specialized transportation (door-to-door) buses to be invoiced for mileage allowing easier validation of invoices against route plans.

These changes will facilitate the accuracy of invoices and a less cumbersome process for the validation of invoices. Invoice amounts will be based on the distance that a bus travels. Distance factors will be totaled together into a Billable Mileage Level by which to validate invoices.

Constraints: Resources to support technology and tools, such as driver scan system, to provide necessary oversight and quickly assess non-compliance.

RECOMMENDATION 5 – FIVE YEAR STRATEGIC PLAN

Challenges: City Schools' service and safety of student transportation is dependent on adequate resources to reduce dependence on taxi cabs, decrease student travel times on yellow buses, and improve the safety for the students and staff who City Schools transports. Thoughtful and strategic organization of the fleet and materials and staff are needed to administer and conduct operations for the safety of students and stewardship of resources.

Objectives: Workgroup members described 3 objectives for a strategic plan:

- 1) Add internal staff and fleet capacity to improve customer service.
 - a. Ongoing improvement to customer services may include but are not limited to: increase in-housing staffing with appropriate fleet and aids (internal staff have high levels of customer service and commitment to City Schools' staff and students), organize staff with accountability to schools in geographic regions, and ensure timely follow up and reporting changes to families.
 - b. Increase of in-house fleet provides supplemental support to address urgent issues and control the costs for routes with high bids.
 - c. Decrease the number of days it takes for a student to receive transportation service.

- 2) Review of the office structure. Create 2 to 4 service regions for supervision and administration of services with assigned Area Transportation Supervisors (ATS) to oversee each of the service regions. Workgroup members noted this model is how most public school transportation operations are organized in the state of Maryland.
 - a. Increase levels of accountability which allows senior staff to monitor and compare productivity or challenges amongst regions. An important KPI for service quality, that was talked about in the Workgroup, is the number of school days it takes for students to receive transportation services.
- 3) Create a management system to monitor, evaluate and respond to performance information.
 - a. Use of Key Performance Indicators and benchmarks to track improvements across OPT investments and strategies, including financial, customer service and oversight measures.

Recommendations: Create a 5-year strategic plan that outlines funding and organizational requirements to improve service, safety and operations. This strategic plan should include a phasing process to add new positions and fleet, resources to review and assess the function of OPT in service regions, and increase support for oversight and monitoring of KPIs for improvements in service, quality, safety and the monitoring of operations.

Timeframe: Short-term (In Process)

The district proposed budget for FY20 includes the addition of two supplemental small buses to begin observation and piloting of adding capacity to the internal fleet. The proposed budget also includes restructuring of the transportation office to streamline processes and provide additional oversight and accountability. Additional analysis is being completed for future budget processes as a part of a 5-year strategic plan.

Constraints: District-level funding resources to support the strategic plan, implementation process, and the acquisition of additional buses and resources to address driver shortages.

BALTIMORE CITY PUBLIC SCHOOLS

1

City Schools Yellow Bus & Specialized Transportation

Transportation Workgroup

January 22, 2018

Cheryl A. Casciani
Chair, Baltimore City Board of School Commissioners

Dr. Sonja Brookins Santelises
CEO, Baltimore City Public Schools

Overview

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|--|--------------|
| 1. Types of service | Slide 3 |
| 2. Sy2016-2017 Per Pupil and Bus Costs | Slide 4 |
| 3. Ridership | Slide 5 |
| 4. Challenges | Slide 6-8 |
| 5. Competing Pressures | Slide 9 |
| 6. Transportation request workflow | Slides 10 |
| 7. Route creation | Slides 11-13 |
| 8. Yellow bus contract costs | Slide 14 |

Types of Service

3



Corner-to-Corner

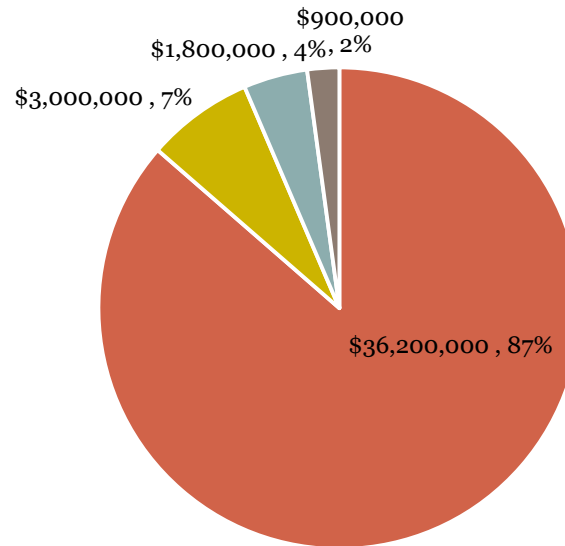
- Pickup and Drop Off at a bus stop
- Fewer stops
- School-wide service
- More students
- Shorter travel distances



Curb-to-Curb

- Pickup & Drop Off at home
- Many stops
- Specialized service
- Fewer students
- Longer travel distances

FY17 Budget Proportions less MTA

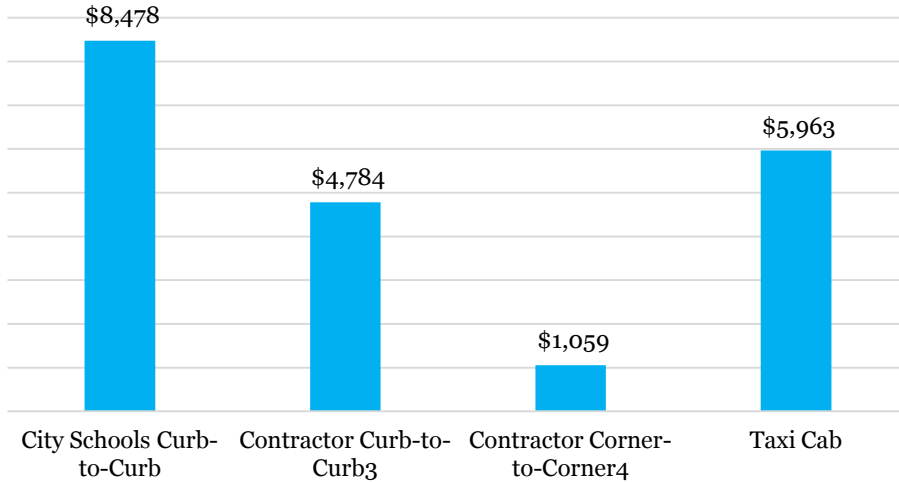


- Curb-to-Curb (Contractor and City Schools Yellow Bus & Taxi Cab)
- Corner-to-Corner (Contractor Yellow Bus)
- Vehicle Maintenance
- Administration

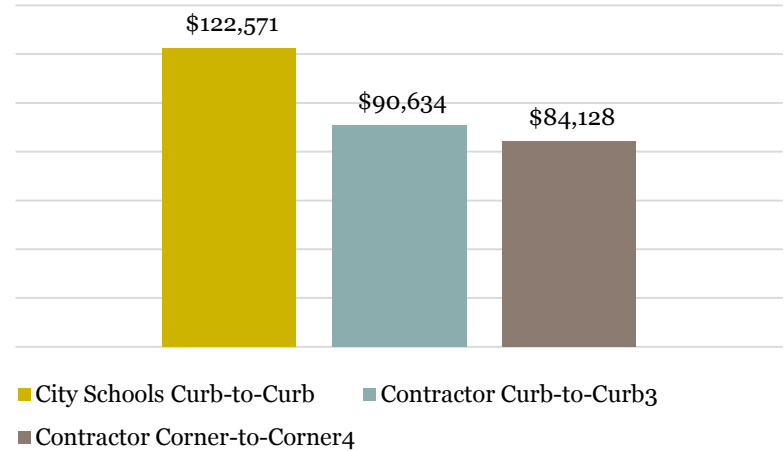
SY2016-2017 Per Pupil and Bus Costs

4

Per Pupil



Per Bus with Route Costs



Service	Students	FY2017 Costs ⁴	Per Pupil	Buses with Routes	Per Bus with Route Costs
City Schools Indirect Costs ¹		\$ 2,695,072			
City Schools Curb-to-Curb	347	\$ 2,941,693	\$ 8,478	24	\$ 122,571
Contractor Curb-to-Curb ³	3,353	\$ 24,652,520	\$ 4,784	272	\$ 90,634
Contractor Corner-to-Corner ⁴	1,800	\$ 3,365,100	\$ 1,059	40	\$ 84,128
Taxi Cab	1,379	\$ 8,223,647	\$ 5,963		
	6,879	\$41,878,032	\$ 6,088	336	

¹ Includes costs for administration, fleet maintenance, safety and support costs. Does not include fringe benefit costs \$4.2 million.

² Includes summer ESY and non-public costs.

³ Approximate costs based on daily contract rates for corner-to-corner services.

⁴ Less MTA and fringe benefit costs.

Ridership as of January 4, 2018

5

Ridership as of January 4, 2018

Curb-to-curb Transportation Reason	SY1718			SY1617*			SY1718 vs SY1617
	Yellow Bus	Taxi Cab	Total	Yellow Bus	Taxi Cab	Total	
RIDE W/SIB	77	7	84	9	1	10	74
HOMELESS	839	316	1155	678	437	1115	40
FOSTER CAR	13	12	25	2	2	4	21
IEP	1910	696	2606	2082	508	2590	16
MEDICAL	135	76	211	143	70	213	-2
504	22	17	39	28	16	44	-5
PRE-SCHOOL	331	2	333	340	3	343	-10
Suspension		4	4	2	18	20	-16
OTHER	42	8	50	56	12	68	-18
ESOL	121	1	122	119	28	147	-25
Corner-to-corner	1800		1800	1800		1800	
	5290	1139	6429	5259	1095	6354	75

*January 4, 2017

Ridership overall is higher compared to same time last year

- 16 more students with IEPs
- 40 more students who are homeless
- 74 more accommodations for siblings to travel together

Due to driver shortage has reduced our capacity by 20 buses

- 277 buses on January 4, 2018
- 297 buses in January 4, 2017

Challenges & What we are doing

6

Location

- Lengthy travel time/distances
- Late bus arrivals
- Increased taxi dependency
- Early pickup times
- Increased student ride time
- Service levels

Drivers

- Driver shortage
- Driver turnover
- Safety staff fill in for drivers
- Increased bus contractor dependency
- Increased taxi dependency
- Decreased hands on

Ridership

- Growing ridership
- Increased travel distance/time
- Increased operational cost
- Increased demand w/o increased resources

Actions

- Work with offices to minimize distance and travel times
- Ensure portfolio decisions consider transportation
- Reroute students to decrease ride times

Actions

- Attend job fairs
- Advertise vacancies on various websites
- Hosted an operations job fair

Actions

- Work with district offices on student's eligibility
- Ensure appropriate services to meet student needs
- Increase efficiency by using corner-to-corner buses for some student groups

Challenges & What we are doing

7

Contract

- Invoice validation
- Service delivery
- Cost control

Safety

- Driver files
- MVA notifications
- CJIS notifications
- Accident processes

Information Flow

- Accuracy of information
- Communication
- Timing in delivery and receipt of information

Actions

- **New:** GPS data to validate costs
- **Upcoming:** invoice validation with GPS data

Actions

- Accident & Driver certification review
- Driver files audits,
- Safety Review Committee

Actions

- Staff assigned to schools to communicate and resolve issues
- Electronic submission of reports

Service & Efficiency Improvement Activities

8

Start of School

- Bus shortages
- Driver shortages
- Unclear on students routed and not routed

Bell Schedules

- To many
- Difficult to link routes to buses

Service

- Call center understaffed
- Late arrivals to schools

Actions

- Instituted call center
- Hired Data Analyst
- Changed analytical practices
- Conducted systemic trainings

Actions





















- Procured transportation consultant
- Decreased bell times from 47 to 7

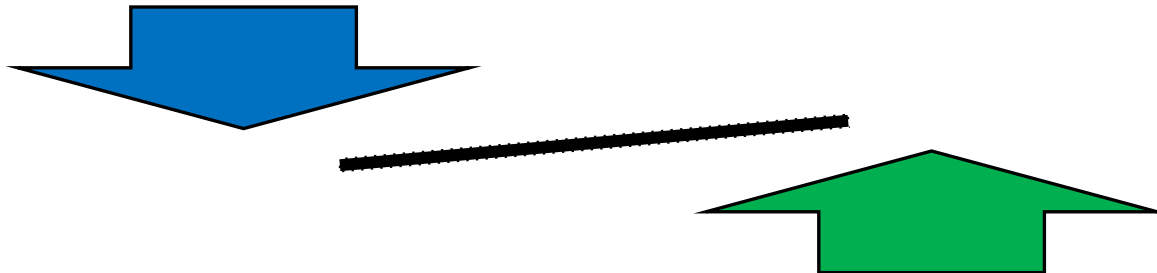
Actions

- Ongoing call center
- Performed site checks
- Implemented a customer service training for contractors
- Procured a GPS system to monitor buses and provide real time information to families

Competing Pressures

9

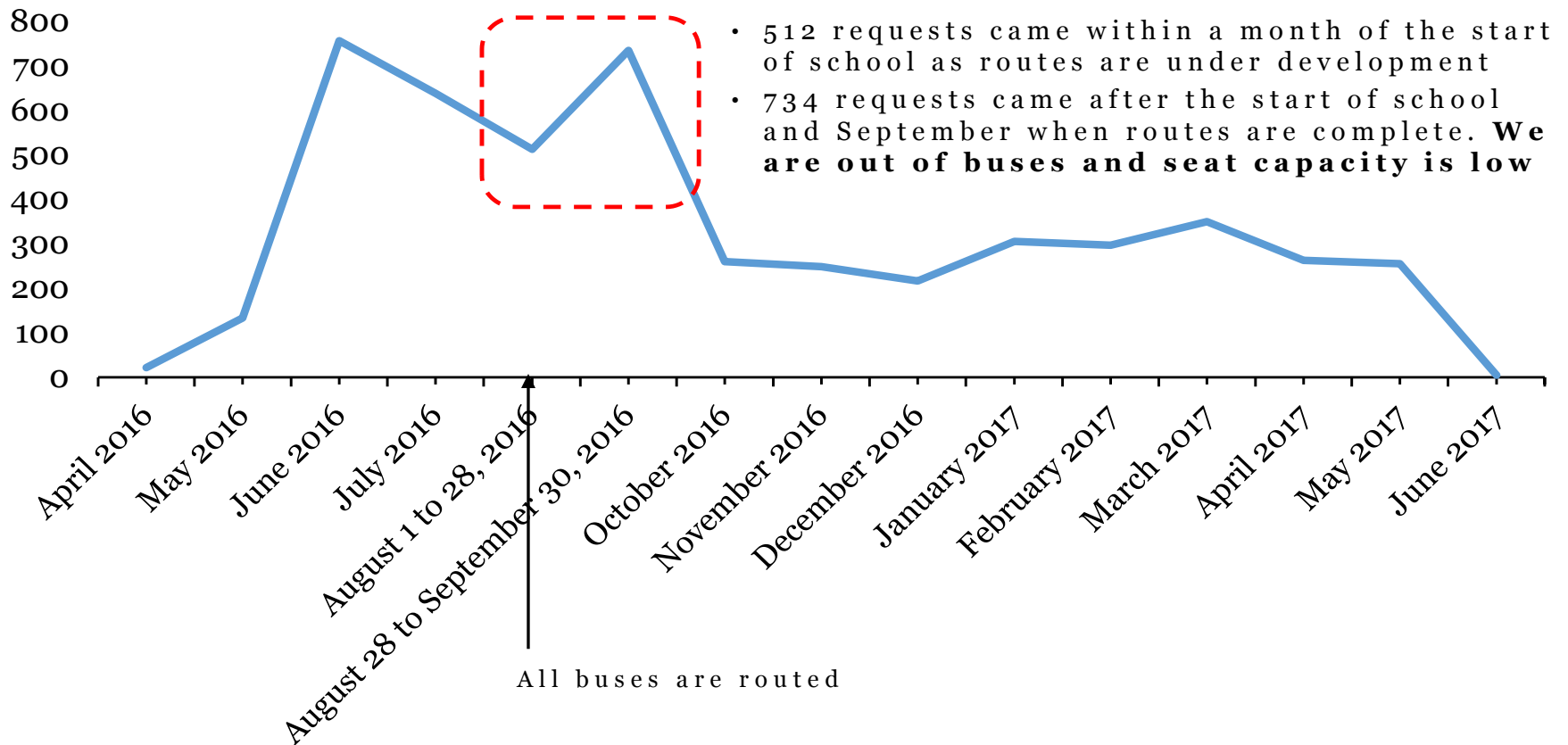
	Bus	Taxi Cab	Budget	Time	Distance
Decrease student ride times					
Decrease students on taxi cabs					
Increase average number of students per bus					
Decrease costs					



Transportation Request Workflow

10

Submission Flow of Transportation Requests: School Year 16-17



Route Creation: Multiple Step Process

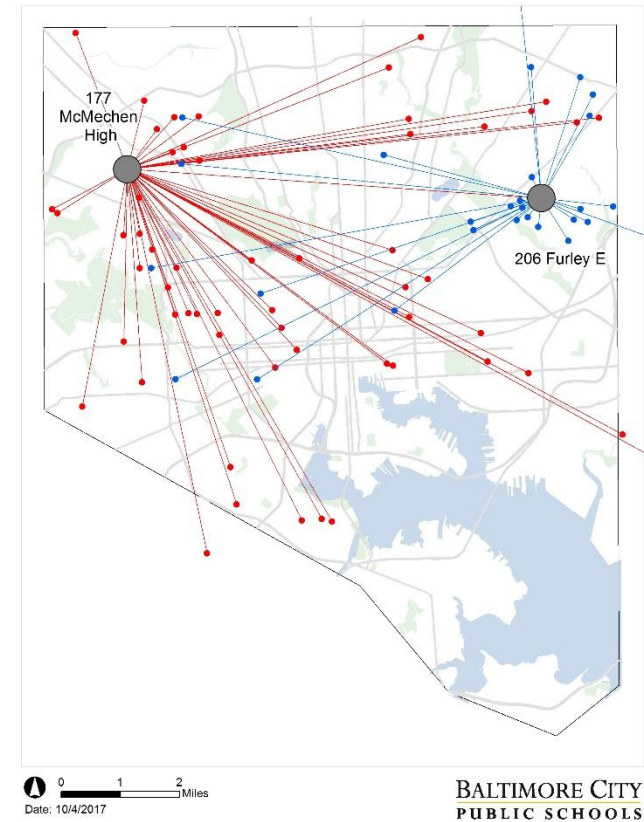
11

1. After request is approved, routers factor travel times and distances from student's home to school to develop routes.

Example:

Student locations for two schools;

- Furley ES 36 students
- George McMechen MS/HS 58 students



Route Creation: Multiple Step Process

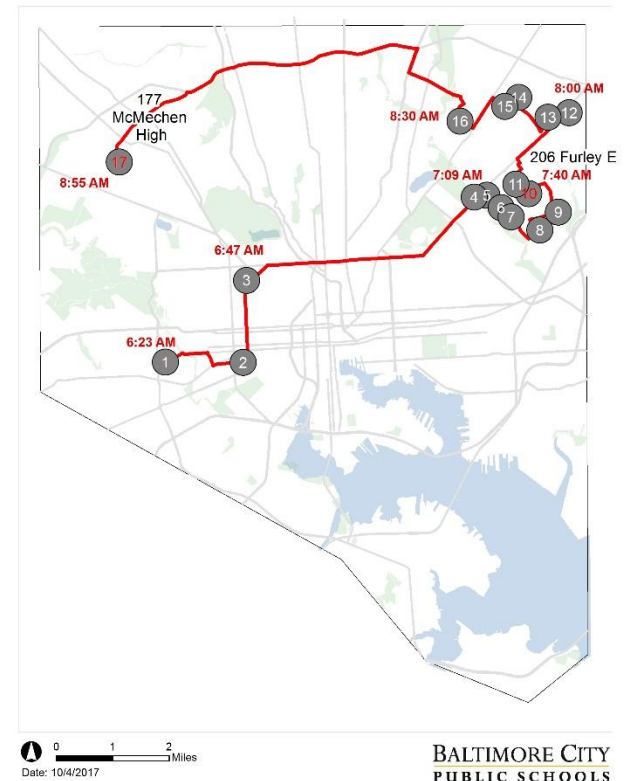
12

2. Routers connect a sequence of student locations to the school. This becomes a yellow bus curb-to-curb route. Further we link routes together which allows one yellow bus to serve more than one school.

Example:

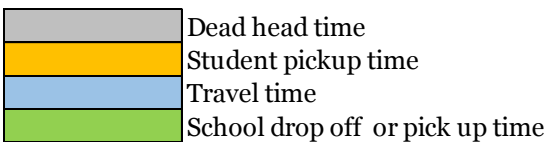
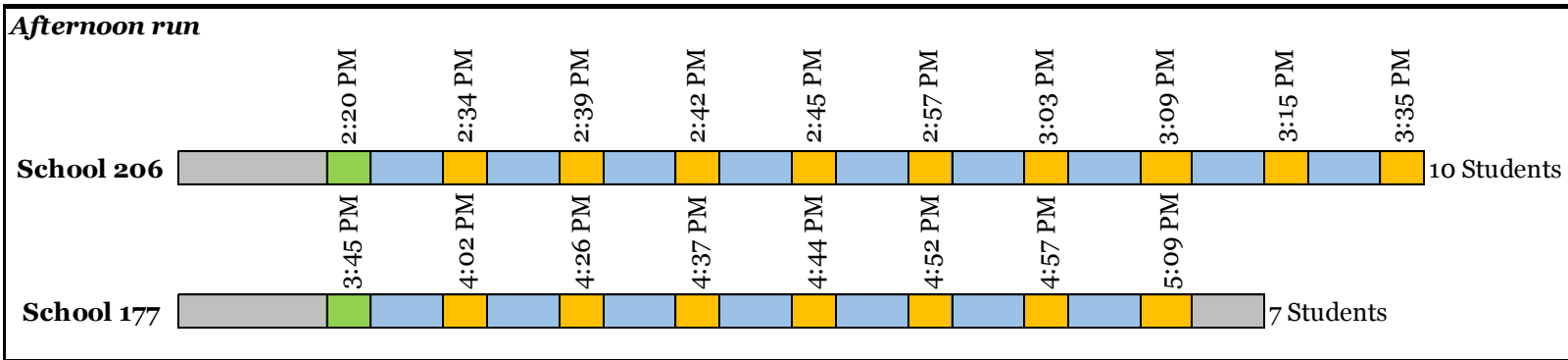
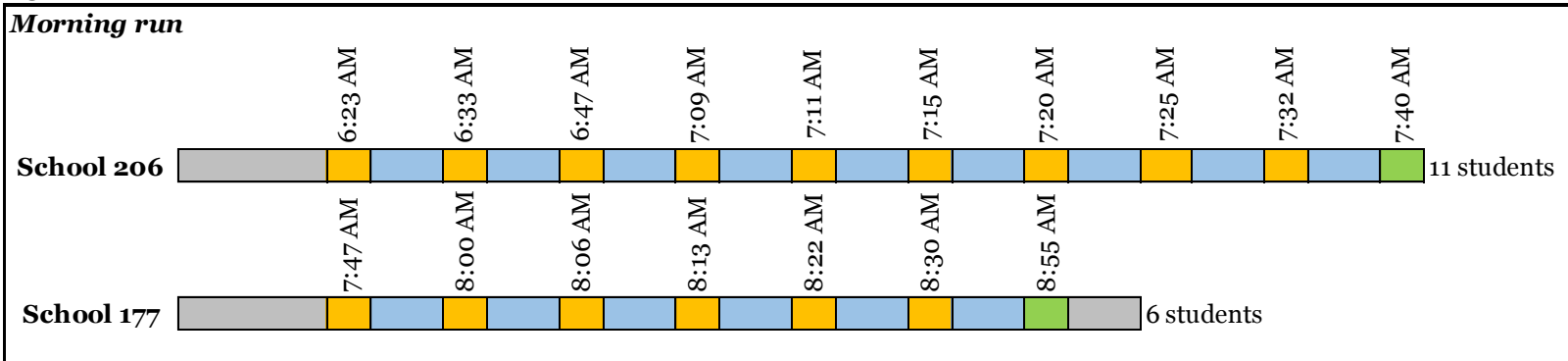
Two routes to two schools run by bus number 3000

- Furley ES 11 students
- George McMechen MS/HS 6 students



Route Creation: Multiple Step Process

3. Yellow buses will serve as many schools as possible during the day; example bus 3000



Yellow Bus Contract Costs¹

14

Two components to daily costs:

1. Base Rate Cost=(60 miles or less) + (4.5 hours or less)

PLUS

2. Over the Base Cost=(cost per mile greater than 60)+(cost per time greater than 4.5 hours)

Example Bus 3000: Over the course of school year 2016-2017 the daily plan was for approximately 5 hours & 20 minutes over 57 miles Monday, Tuesday, Thursday and Friday. On Wednesdays it serviced an additional school adding 1 hour and 15 miles to its daily travel.

- \$422 (base cost)=(57 miles)+(4.5 hours)
- \$40 (over the base cost: M, T, R, F)=(50 minutes) x (\$.80)
- \$68 (over the base cost: W)=(1 hour x \$48) + (12 miles x \$1.65)
- Bus 3000 daily costs are \$462 (M,T,R,F) and \$490(W)
- \$84,168 are its school year 2016-2017 costs
- \$4,951 per pupil cost

¹Contract awards were made through an open and competitive bid request.

NO PLACE LIKE SCHOOL:

SUPPORTING THE EDUCATION OF HOMELESS CHILDREN

Public Justice Center
www.publicjustice.org

Student Homelessness: Background and Legal Framework

Who is Homeless?

- Children who **lack a fixed, regular, and adequate nighttime residence**—
 - “Doubled up” or “couch surfing” - sharing the housing of others due to loss of housing, economic hardship, or similar reason [majority of homeless students]
 - Living in motels, hotels, trailer parks, camping grounds due to lack of adequate alternative accommodations
 - Living in places not meant for human habitation – cars, abandoned buildings, transit stops
 - Living in shelters
 - Living in transitional housing
- Causes of homelessness - Lack of affordable housing, eviction, foreclosure, domestic violence, family breakdown, natural disaster, disability

Barriers to Education Facing Homeless Students

- High mobility resulting in frequent transfers
 - 41% attend 2+ schools in school year; 28% attend 3+
 - Each transfer sets student back 4-6 months, affects peers
- Enrollment requirements (school records, health records, proof of residence and guardianship)
- Lack of transportation
- Lack of school uniforms, supplies etc.
- Difficulty accruing credits
- Concerns about reporting to authorities
- Embarrassment/lack of understanding

McKinney-Vento Act: Protections, Generally

- Each homeless child or youth must have “equal access to the same free, appropriate public education, including a public preschool education,” as other children and youth
- School system must proactively identify homeless students and review and remove barriers’ to their enrollment, attendance, and academic success

Specific Protections at a Glance

- **School Stability** – Keep child in school of origin unless not in best interest or not desired by parent/youth.
- **Transportation** – Provide transport to school of origin
- **Immediate Enrollment** – Ensure students are in class “immediately” even if missing records or, for UHY, not w/parent
- **Supportive Services** – Provide school uniforms, fee waivers, tutoring, ongoing academic monitoring and support
- **Dispute process** – Put denials of service in writing, w/ chance for appeal; parents/students’ choice prevails while appeals pending
- **Collaboration** – With partners serving homeless youth
- **Data collection** – On identification, barriers facing homeless students and strategies to overcome, program evaluation
- **School district liaisons** - To identify students, assist with enrollment, coordinate services, mediate disputes

Focus: McKinney-Vento and Transportation

- **Transportation**
 - Must be set up promptly, interim supports during waiting period
 - Must be timely, safe – avoid homelessness-related barriers
 - Applies across school district lines
 - Applies throughout homelessness *and* until end of year in which student obtains permanent housing
 - Parents must be reimbursed for costs incurred b/c of delays
- **Dispute resolution** – Denials should be written, w/appeal option
- **Funding** – Can use Title I, McKinney-Vento, and general funds to support; obligation exists regardless of funding
- **Data collection** – Consider collecting, analyzing data on transportation usage to facilitate removal of barriers
- **Collaboration** – Work w/partners to streamline transportation
- **School district liaisons** - Should be part of transportation planning, and troubleshooting

Implementation → Measurable Results

- Prince George's County, Maryland
Following implementation, nearly twice as many homeless students remained in their school of origin. Homeless students also improved test scores and graduation rates relative to student body
- Baltimore County, Maryland
Following implementation, identification of homeless students improved, as did homeless student test scores
- Washington State Evaluation:
Homeless students who remained in school of origin scored higher on standardized state tests

Homeless Students in City Schools

Status: Homeless Students & Transportation in City Schools

- Pre-K- 5: Curb-curb for 1+ mile, yellow bus or cab
- S Pass for grades 6-12
- School staff identifies student → transportation coordinator enters request in eTR → Homeless Liaison approves → Transportation routes
- Transportation has a staffperson who focuses on homeless student routing
- Budget: \$8.7 million in 2016-17, general funds

Challenges: Homeless Students & Transportation in City Schools

- Stated policy of 7-10 days to arrange transportation, often longer, even for cab service
- Interim supports – e.g. tokens for child and parent – unavailable at schools, or not effective – e.g. parent is disabled and cannot walk child to bus, parent has children at multiple schools
- Parents ill-equipped to troubleshoot directly with school bus or cab contractor re timeliness, other issues

Challenges: Homeless Students & Transportation in City Schools

- Confusion among school staff on who is homeless/eligible for transportation
- Services stop upon move to permanent housing, but should continue until end of school year
- Little flexibility around accommodating extracurriculars, even with cabs
- Middle/high school students come from distant communities b/c of homelessness, and have difficulty navigating public transit
- No written denials of transportation services

Practices to Consider

- Adopt standard policy of 3-5 days for arranging longer term transportation (DP, OC, CM)
- Collect data on time to arrange transport
- Streamline process for entering/approving transport requests (OC)
- Route special ed buses whenever possible (DP, OC, CM)
- Rely on temp. staff and/or other school vehicles (e.g. facilities) for transport (DP)

- Streamline mileage reimbursement, and permit non-parent drivers to access (OC)
- Use central pickup/dropoff point (or corner to corner) for longer distances (CM)
- Regular training for transportation coordinators and office staff (OC)
- Fund transportation creatively – incl. Title I, McKinney-Vento, private donors (DP, OC)
- Provide written denials of transportation services, w/explanation of appeal

- Collaborate w/partners to transport – DSS, churches etc?
- Consider rideshare?
- Provide more than an S Pass to some older homeless students, case by case
- Analyze costs/benefits of contracted vs. district-run
- Consult NAEHCY, School House Connection, other school districts



School District of Philadelphia Department of Transportation Services

Transportation Department Overview

*We provide **safe** and **reliable** transportation services to all eligible students in a **fiscally-responsible** manner.*

*Marvin Lee
General Manager*





Agenda

- ***Who is Marvin Lee?***

- ***Overview of SDP Department of Transportation Services***
 - *Size and Complexity*
 - *Organizational Chart*
 - *Data Flow*
 - *Budget in Brief*

- ***Challenges, Successes, and Lessons Learned Since 2015***
 - *Customer Satisfaction*
 - *Route Coverage*
 - *Communication (GPS)*
 - *Cost Control*
 - *Professional Development of Staffs*
 - *Standard Operating Procedures*
 - *Rapid Response Team*
 - *Some of the Future Projects*



Overview of SDP Department of Transportation Services

What do we do and how do we do?

Overview

- 1 **Size and Complexity**
- 2 Organizational Chart
- 3 Data Flow
- 4 Budget in Brief

Mission: To provide safe and reliable services to all eligible students in a fiscally responsible manner.

	# Schools	# Routes	# Riders	# Transpass
Public Schools	218	629	11,829	30,963
Charter Schools	86	481	17,986	21,388
Non-Public Schools	250+	656	11,594	9,461
	550+	1,766	41,409	61,812

General Rule of Eligibility:

- 1.5 Miles from school (per ESRI Map)
- Grade 1 – 6: School Bus
- Grade 7 – 12: Transpass

Or

- Special Circumstances, such as IEP requirement, 504 plan, homeless or refugee

Rank	School District	Route Buses 2017	Route Buses 2016	Change 2017 vs. 2016	Total Buses	Small Buses
1	New York City Department of Education New York City	9,000	8,000	+1,000	10,350	6,500
2	Clark County School District Las Vegas	1,698	1,752	-54	1,957	947
3	Los Angeles Unified School District Los Angeles	1,689	1,760	-71	2,006	1,170
4	Gwinnett County Public Schools Lawrenceville, Georgia	1,636	1,326	+10	1,880	534
5	School District of Philadelphia* Philadelphia	1,283	1,283	0	1,411	283
6	Chicago Public Schools* Chicago	1,271	1,271	0	1,483	400

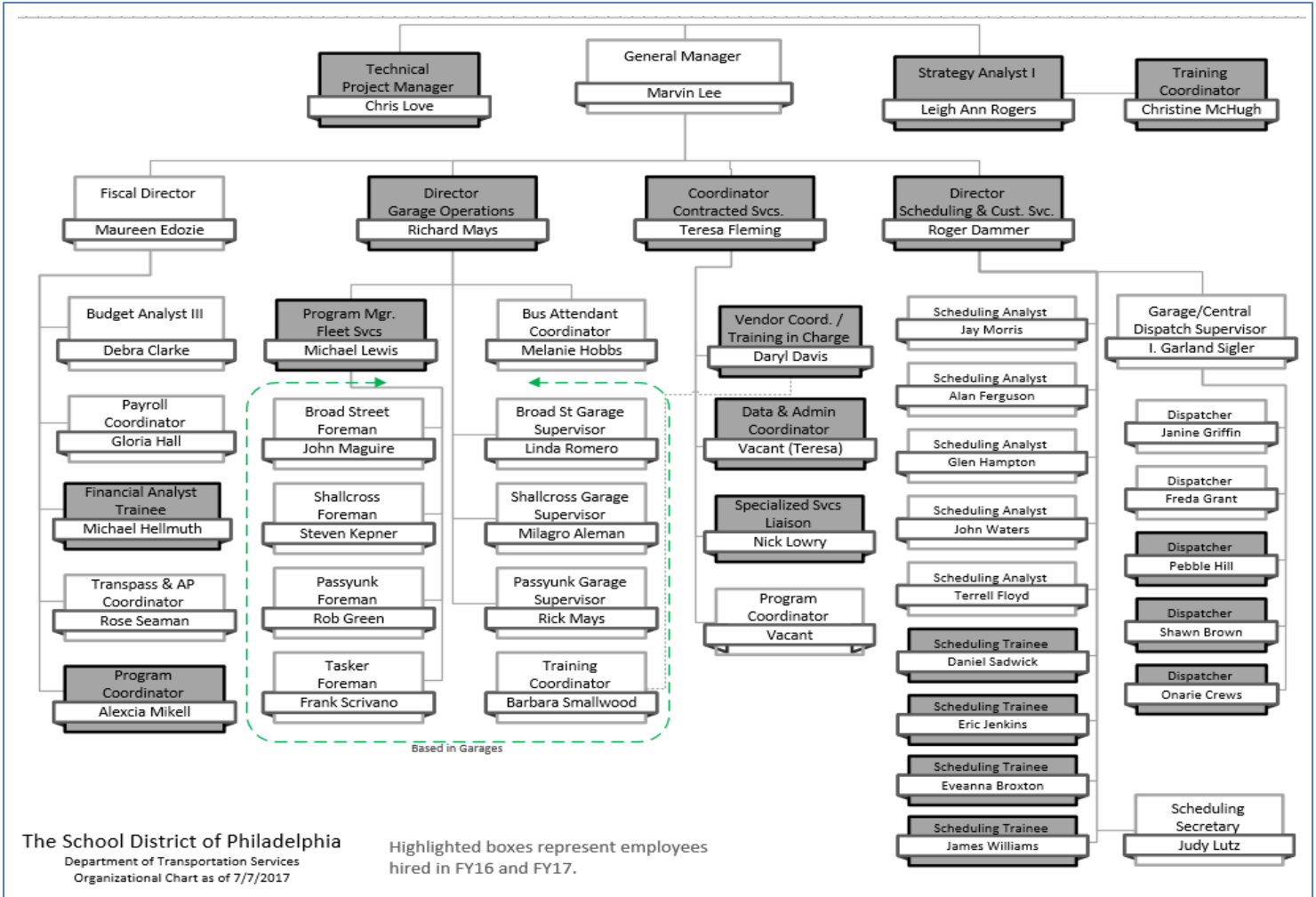
Fun Facts:

- Transportation is provided up to 10 miles outside of the City boundary
- SDP Transportation runs the 5th largest school bus fleet in the nation.
- 17% of the routes are served by SDP drivers from three different garages, and the rest is served by 15 bus vendors and 5 School Vehicle/Cab vendors.

How is the Department structured?

Overview

- 1 Size and Complexity
- 2 Organizational Chart**
- 3 Data Flow
- 4 Budget in Brief



The School District of Philadelphia
 Department of Transportation Services
 Organizational Chart as of 7/7/2017

Highlighted boxes represent employees hired in FY16 and FY17.

Trust the Process

The vast majority of the time in the beginning was spent in finding the talent in/out of the department, negotiating and securing budget, & executing the hiring.

Currently working on reorganization before the next SY.

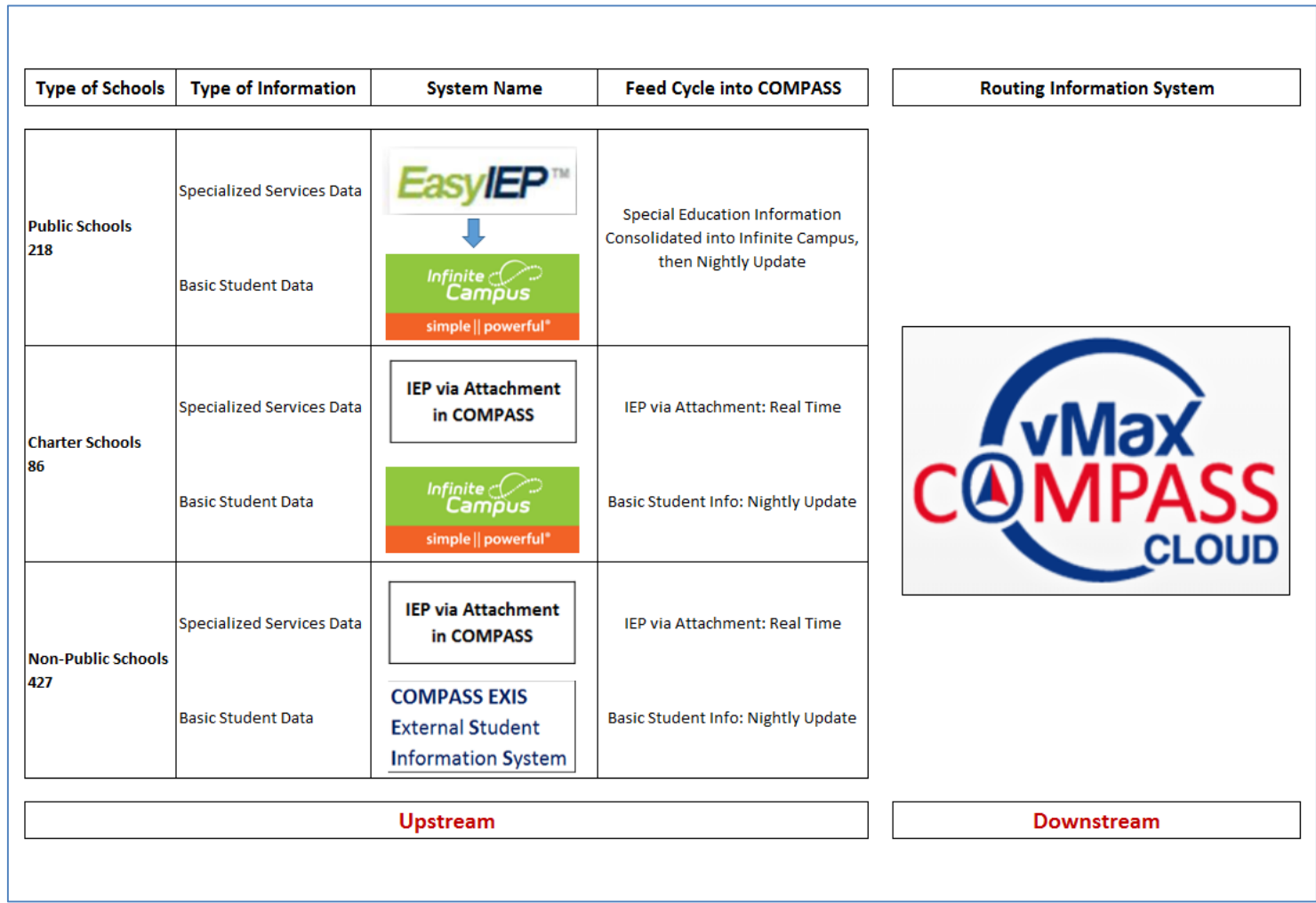
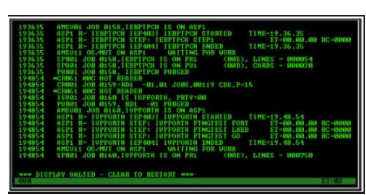
Transportation Leadership Team: Garage Ops, Bus Attendants, Equipment (Fleet, GPS, Video) Management, Routing, Vendor Management, Specialized Services Transportation, Communication, & Fiscal/Admin

How do we get the student data?

Overview

- 1 Size and Complexity
- 2 Organizational Chart
- 3 **Data Flow**
- 4 Budget in Brief

SDP has been using COMPASS since the SY2015-16. Before COMPASS, the District was using large maps on the wall with pins and strings to schedule routes and entered the stops in a homegrown mainframe system.



How much money do we spend per year?

Overview

- 1 Size and Complexity
- 2 Organizational Chart
- 3 Data Flow
- 4 Budget in Brief**

Transportation budget has been growing rapidly primarily due to special education population growth.

FY16: \$165M

FY17: \$173M

FY18: \$188M

We expect approximately \$80M will be reimbursed by the State in FY18.

<i>TRANSPORTATION BUDGET</i>	<u>FY 2018 (BUDGET)</u>
PERSONNEL	\$15.7M
OVERTIME	\$2.3M
BENEFITS	\$15.9M
PERSONNEL AND BENEFITS TOTAL	<u>\$33.9M</u>
TO/FROM BUS CONTRACTS	\$75.3M
SEPTA	\$39.2M
OTHER CONTRACTS	\$1M
CONTRACTED SERVICES TOTAL	<u>\$115.5M</u>
SUPPLIES	\$3.4M
EQUIPMENT	\$1.6M
SUPPLIES AND EQUIPMENT TOTAL	<u>\$5M</u>
TRANSPORTATION BUDGET TOTAL	\$154.4M
 <i>BUS ATTENDANT BUDGET</i>	
PERSONNEL	\$7.1M
BENEFITS	\$9.8M
CONTRACTED SERVICES	\$17M
BUS ATTENDANT BUDGET TOTAL	<u>\$33.9M</u>
GRAND TOTAL	<u><u>\$188.3M</u></u>



Challenges, Success and Lessons Learned

Unhappy Customers

*Challenges, Success,
and Lessons Learned*

1 Customer Satisfaction

2 Route Coverage

3 Communication (GPS)

4 Cost Control

5 PD (Prof. Dev. Of Staffs)

6 Building the Backbone

7 Standard Ops. Procedures

8 Rapid Response Team

9 Future Projects

Problem: Transportation is the worst Department ever. They don't care. They never return calls or e-mails. I don't even call them anymore.

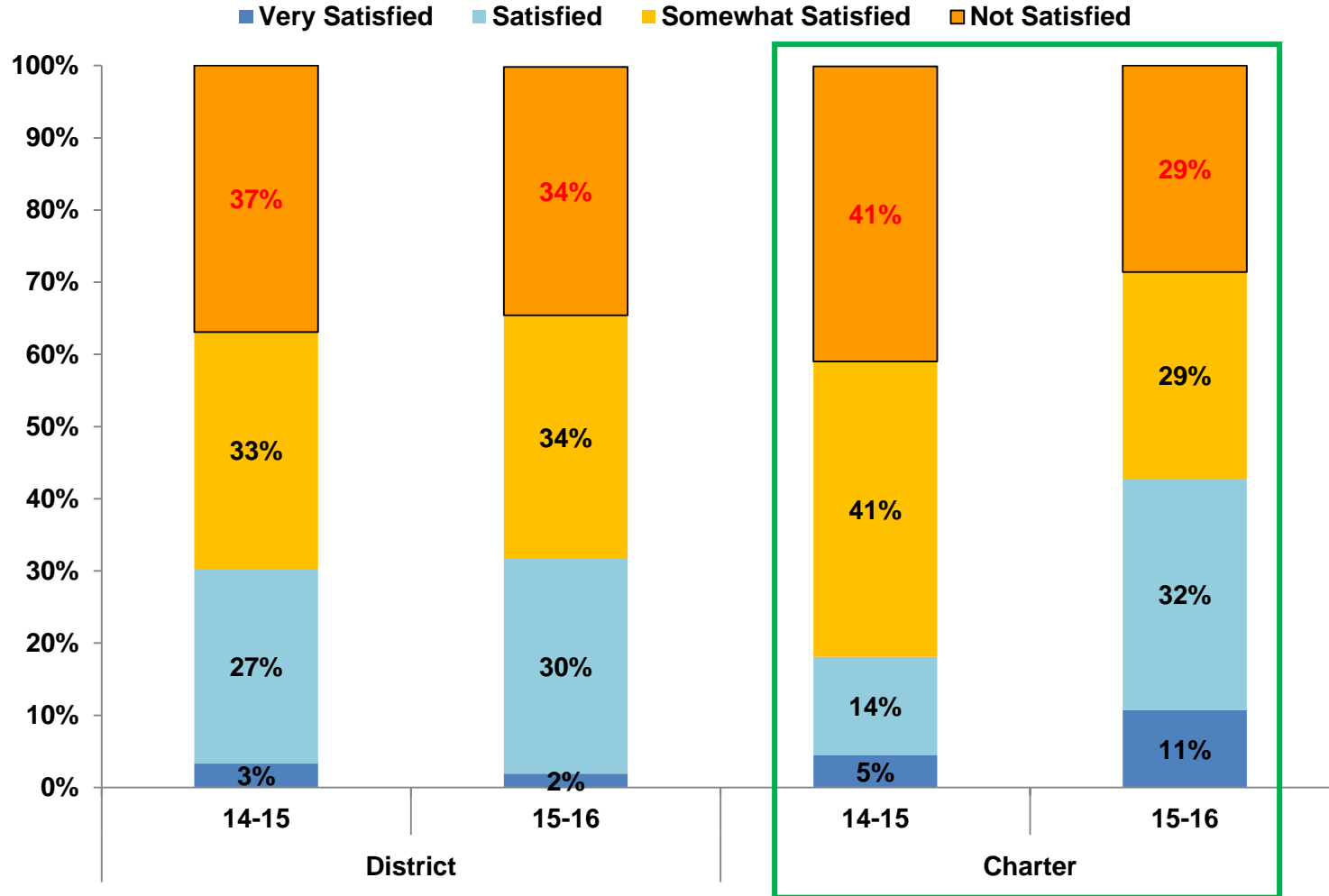
How SDP Addresses the Issues:

- *Basic professionalism: return e-mail / return phone calls*
- *Making schedulers "Account Manager" of their schools. Get out of "I only route" mentality. (Still working on it. Some embraced, some didn't)*
- *Publicly posted Analyst Assignment to each school (used to be a secret)*
- *Made admin. Staffs (approx. 20) Customer Service Liaison to schools*
- *Created Principal Hotline that jumps to the front of the queue.*
- *Send admin staffs and garage staffs to visit as many schools as possible.*
- *School Opening Call Center: 20 Additional Call Takers*

After handling a problem well, make sure that the principal say we handled the issue well.

The only way to get out of the negative perception!

The result of our effort in the first year



Transportation focused on handling the Charter school satisfaction in the first year as they are the largest customer group with almost 50% ridership. Survey conducted and analyzed by the District's Performance and Evaluation Team under the CEO's Office.

Route Coverage

*Challenges, Success,
and Lessons Learned*

1 Customer Satisfaction

2 **Route Coverage**

3 Communication (GPS)

4 Cost Control

5 PD (Prof. Dev. Of Staffs)

6 Building the Backbone

7 Standard Ops. Procedures

8 Rapid Response Team

9 Future Projects

Problem: With national epidemic of school driver shortage, Transportation is not able to cover routes on-time!

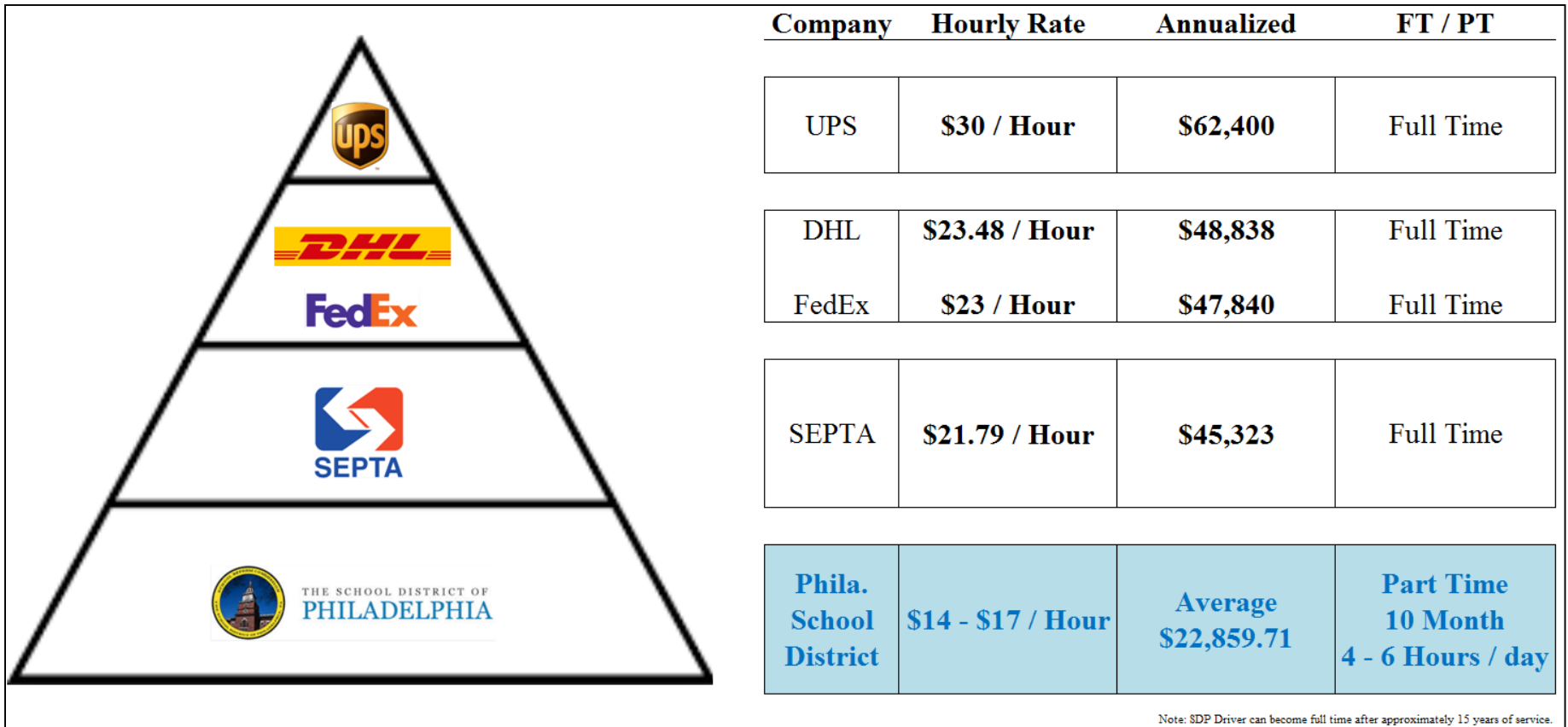
How SDP Addresses the Issues:

- *Right-size our vendor portfolio*
 - *Based on our experience, More than 200 routes = Problem*
 - *Cancelled contract with 3 bus companies*
- *Introduce a large capacity bus company with strong training program*
 - *We have 5 major companies keep on adding CDL drivers to the market. They just don't come. You need to ask them to come.*
- *Revamp School District based CDL Training Center*
 - *Made 13 additional part-time drivers CDL instructor (from 5)*
 - *Accept the fate that we are the bottom-feeder of the CDL market.*
- *(Try to) Influence the Upstream Decision Makers*
 - *Special Education Transportation has been growing rapidly.*

*Shortage of drivers =
higher unit cost in the
contract.*

Why is it hard to hire and retain school bus driver?

Why are we having driver shortage?



Note: SDP Driver can become full time after approximately 15 years of service.

Communication (GPS)

Challenges, Success, and Lessons Learned

- 1 Customer Satisfaction
- 2 Route Coverage
- 3 Communication (GPS)**
- 4 Cost Control
- 5 PD (Prof. Dev. Of Staffs)
- 6 Building the Backbone
- 7 Standard Ops. Procedures
- 8 Rapid Response Team
- 9 Future Projects

Problem: We had more than 1,000 buses operating everyday pinging their GPS information into the cyber space, but no one has seen any GPS data.

How SDP Addresses the Issues:

Extensive Market Research (10 months)

- *Meeting with solution providers / Trade Shows / Request for Information*

Solution through Request for Proposal Process (6 months)

- *Replacement Model – Mandate all buses to have the same unit*
- ***Consolidation Model*** – *Aggregate various units into a single platform*
 - *5 year contract signed with TripSpark in June 2017*

Execution (Sub-bus function)

- *Change of Culture (Extremely Difficult)*
- *Approximately 80% Vendor Compliance Rate*
- *Liquidated Damage in the contract for non-compliance*
- *Managerial Report (on-time performance) / Compliance Report*
- *ESY Assignment based on GPS Compliance*

*The current GPS
company offers:*

*Admin View (Now)
School View (SY18-19)
Parent View (Future)*

Contract Cost Control

Challenges, Success, and Lessons Learned

1	Customer Satisfaction
2	Route Coverage
3	Communication (GPS)
4	Cost Control
5	PD (Prof. Dev. Of Staffs)
6	Building the Backbone
7	Standard Ops. Procedures
8	Rapid Response Team
9	Future Projects

School Vehicle Drivers:

Although not required by the State, SDP contract stipulates mandatory 14 hours of PA Publication 117 in-class training.

Problem: Annual budget increase is approximately \$10M a year since FY16 and it is absolutely not sustainable!

How SDP Addresses the Issues:

School Vehicle – 40% Cheaper than Bus (Supply and Demand)

- *In PA, we are allowed to transport students with school vehicle (10 passenger or less van) without CDL license*
- *Identified approximately 100 routes that can be “downgraded” to school vehicles from traditional bus routes. Communication to schools is a key!*

Bus Attendant (Process Improvement)

- *1,000+ contracted Bus Attendants / \$17M Contractor Budget*
- *Time sheet required, but always 100%. Super dedicated employees.*
- *ID Card / Scanned at School / Tablet to be given schools (2 functions)*

Cab Contract Unit Cost Reduction (Market Dynamics / Negotiation)

- *Thanks Uber. (By the way, Uber is not interested in our work)*
- *Approximately 15% cheaper unit cost than the previous contract*

Challenges, Success, and Lessons Learned

Drivers/Attendants Professional Development

- 1 Customer Satisfaction
- 2 Route Coverage
- 3 Communication (GPS)
- 4 Cost Control
- 5 PD (Prof. Dev. Of Staffs)
- 6 Building the Backbone
- 7 Standard Ops. Procedures
- 8 Rapid Response Team
- 9 Future Projects

Problem: Used to be 3 issues- more drivers, more new buses, and better job at fleet maintenance. Now we need to know how to handle wild kids!

How SDP Addresses the Issues:

We asked our employees what they wanted to be trained on. Result of the Survey in Nov, 2016

Topic	Drivers	Attendants	Total
1 Parent and School Communication	61	61	122
2 Crisis Management on the Bus	50	61	111
3 De-escalation on the bus	46	64	110
4 First Aid on the Bus	35	67	102
5 Driver and Attendant Responsibilities in an Accident	30	69	99
6 Understanding Disabilities	36	49	85
7 Managing behaviors of students with special needs	20	61	81
8 Bullying Prevention on the School Bus	16	56	72
9 Emergency Readiness	20	37	57
10 Conflict Resolution	23	29	52
11 Student Interaction	22	29	51
12 Student Engagement	14	36	50
13 How to communicate with students that are visually impaired or have cognitive challenges	23	22	45
14 Customer Service	29	13	42
15 Safety Best Practices and Defensive Driving	24	14	38
16 Pre-trip inspection	31	0	31

Resources now Avail:

- 5 Firms via RFQ
- PA State of Ed.
- SDP Office of Specialized Svcs.
- Various SpEd Schools

Our field staffs will spend many hours in classroom whether they like it or not! 😊

SDP uses In-Service days to train our staffs.

Vendor employees are trained before the beginning of the school year.

*Challenges, Success,
and Lessons Learned*

Strong In-House Operations

1	Customer Satisfaction
2	Route Coverage
3	Communication (GPS)
4	Cost Control
5	PD (Prof. Dev. Of Staffs)
6	Building the Backbone
7	Standard Ops. Procedures
8	Rapid Response Team
9	Future Projects

Problem: District used to run 40% of the portfolio 9 years ago, but now only 17%. We had a vendor that asked for 45% increase in unit cost.

How SDP Addresses the Issues:

Investment in Garage Operations

- *90 New Buses in last 2 years. More funding dedicated*
- *Upgrading Garage Facilities*
- *Investing in our people (PD, Strong Managers, etc)*

Fleet Management in Focus

- *Outsource non-bus fleet maint. to focus on bus fleet (7/1/18 to ARI)*
- *Invest in our garages – Bus Lift! Fluid Injection System!*
- *Parts Consignment Program with NAPA to reduce admin lead time*
- *High School Internship program (Made 3 full time)*
- *Targeting 1:25 A Mechanic to Bus Ratio*
- *Stronger internal control in service contract management (auth. no.)*
- *After completion of revamping, our mechanics to vendors to audit*

We made a decision to have 12% driver reserve ratio in our garages while we require 10% reserve ratio from contractors.

SDP garages usually have 9% call out rates. Reserve drivers hold contractor routes down.

Challenges, Success, and Lessons Learned

Standard Operating Procedures

- 1 Customer Satisfaction
- 2 Route Coverage
- 3 Communication (GPS)
- 4 Cost Control
- 5 PD (Prof. Dev. Of Staffs)
- 6 Building the Backbone
- 7 Standard Ops. Procedures**
- 8 Rapid Response Team
- 9 Future Projects

Problem: Any large organization must have documented Standard Operating Procedures. Ours is from 1990s. Nuff Said.

How SDP Addresses the Issues:

- *Identified framework*
- *We are about a year out before providing more updates*
- *More than 200 topics identified*

School District of Philadelphia Department of Transportation Services Standard Operating Procedures		Standard Operating Procedure (SOP) Title	
SOP Number	Functional Unit Name in Transportation	Author's Name and Title	
Date of Original Final Draft	Date Last Revised	Effective Date	Discard Policy? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Parties Involved			
Mandatory Knowledge for the Following Parties (Need better description)			
Parties that should receive this information (Need better description)			
Known Affected Parties			
Standard Operating Procedure Detail			
Communication Plan of this SOP			
Service Level Agreement			
Dependencies			
Author			
Footnotes			
Submission and Approval			
Requestor Submission Name	General Manager Approval		
Name	Name		
Signature and Date	Signature and Date		

Rapid Response Team

Challenges, Success, and Lessons Learned

- 1 Customer Satisfaction
- 2 Route Coverage
- 3 Communication (GPS)
- 4 Cost Control
- 5 PD (Prof. Dev. Of Staffs)
- 6 Building the Backbone
- 7 Standard Ops. Procedures
- 8 Rapid Response Team**
- 9 Future Projects

Problem: We need to be able to quickly respond to urgent / high profile issues. Let's have a dedicated team from our CDL trainees.

How SDP Addresses the Issues:

- *Transportation purchased 12 Ford Transit Vans to be dispatched as-needed basis each morning.*
- *You must be going through our CDL training to become Rapid Response drivers. And, you can't stay at this job for more than 6 months.*
- *Managed by Central Customer Service (Not Garage or Vendor)*
- *Been a nice success this year.*



2017 Ford Transit Passenger Wagon

Future Projects

Challenges, Success, and Lessons Learned

- 1 Customer Satisfaction
- 2 Route Coverage
- 3 Communication (GPS)
- 4 Cost Control
- 5 PD (Prof. Dev. Of Staffs)
- 6 Building the Backbone
- 7 Standard Ops. Procedures
- 8 Rapid Response Team
- 9 Future Projects**

Some of the Projects We are Planning Now

- *Routing / GPS in a Single Platform*
 - *How we route vs. How garages run the routes*
 - *More realistic route request / pick-up times*
 - *Pre-requisite before more Routing Efficiencies can be realized*
- *Feedback Management*
 - *Handle thousands of complaints every day via various modes. phone/e-mail/letter/fax/walk-in/public testimony/newspaper!*
 - *Need a single platform to handle all feedbacks and close loops*
 - *Parents, Schools, Drivers, Attendants, Garages, Administration, Politicians, General Public, etc*
- *Phase II & III of GPS*
 - *It can only work after successful Phase I (Garage Dispatching)*

Please feel free to reach out

Marvin Lee

Deputy COO / General Manager of Transportation
Services

440 N. Broad Street, Suite 311

Philadelphia, PA 19130

mlee2@philasd.org

215-400-5628 (Office) / 215-609-2284 (Cell)



BCPS Transportation Overview

*Presented to:
Baltimore City Office of Transportation*

April 26, 2018





The mission of the Office of Transportation is to provide safe and efficient school transportation services in an environment that fosters positive social interaction and allows students to be successful learners.





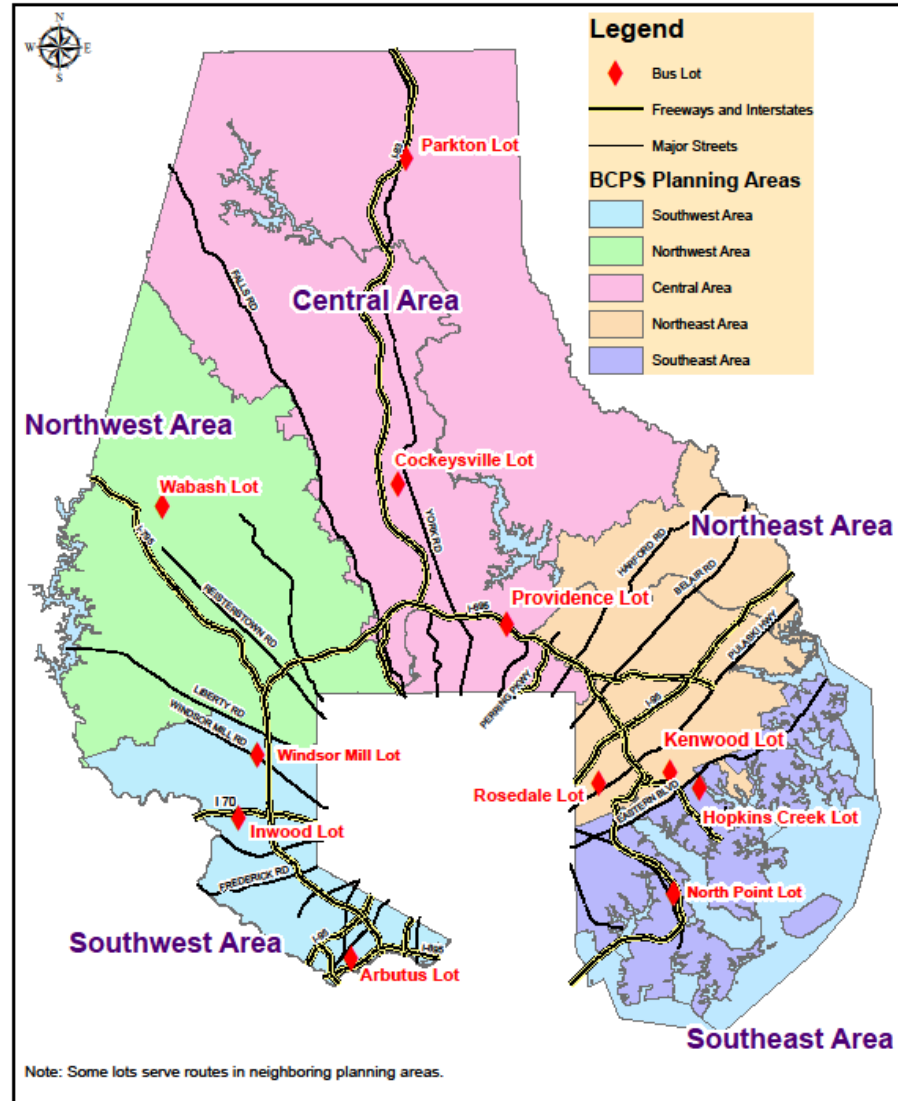
Who We Are

- 25th largest district-owned school bus fleet in the U.S.
- Maintain 856 buses on 11 bus lots
- Transport over 81,000 students daily
- Travel 73,525 miles each day (13M+ annually)
- 827 daily routes (621 general education routes and 206 special education routes)
- 3 full-service maintenance facilities





Baltimore County Public School Bus Lot Locations



Prepared by the Baltimore County Public Schools
Office of Strategic Planning, November 16, 2016

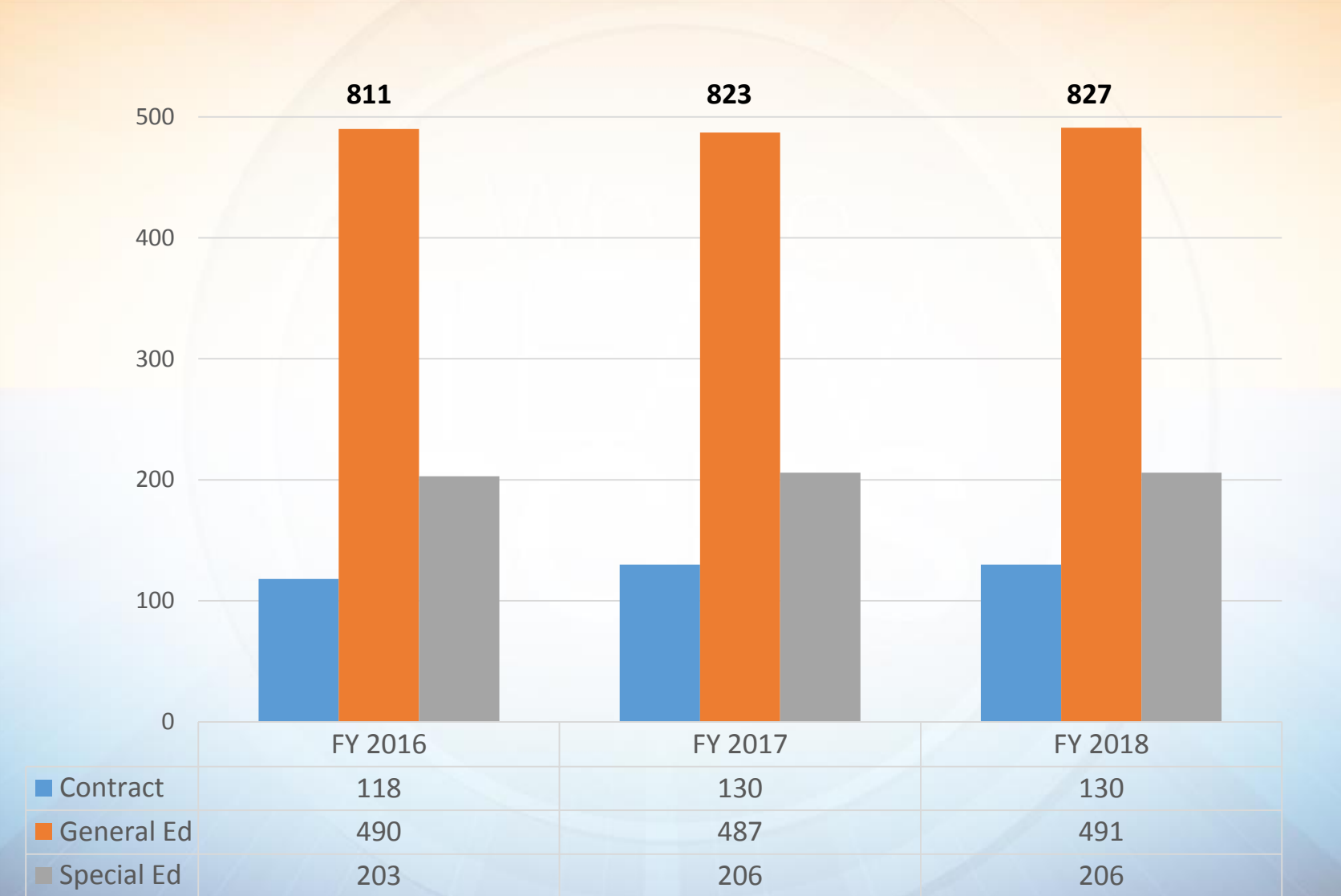
0 2.5 5 10 Miles





Number of BCPS Routes

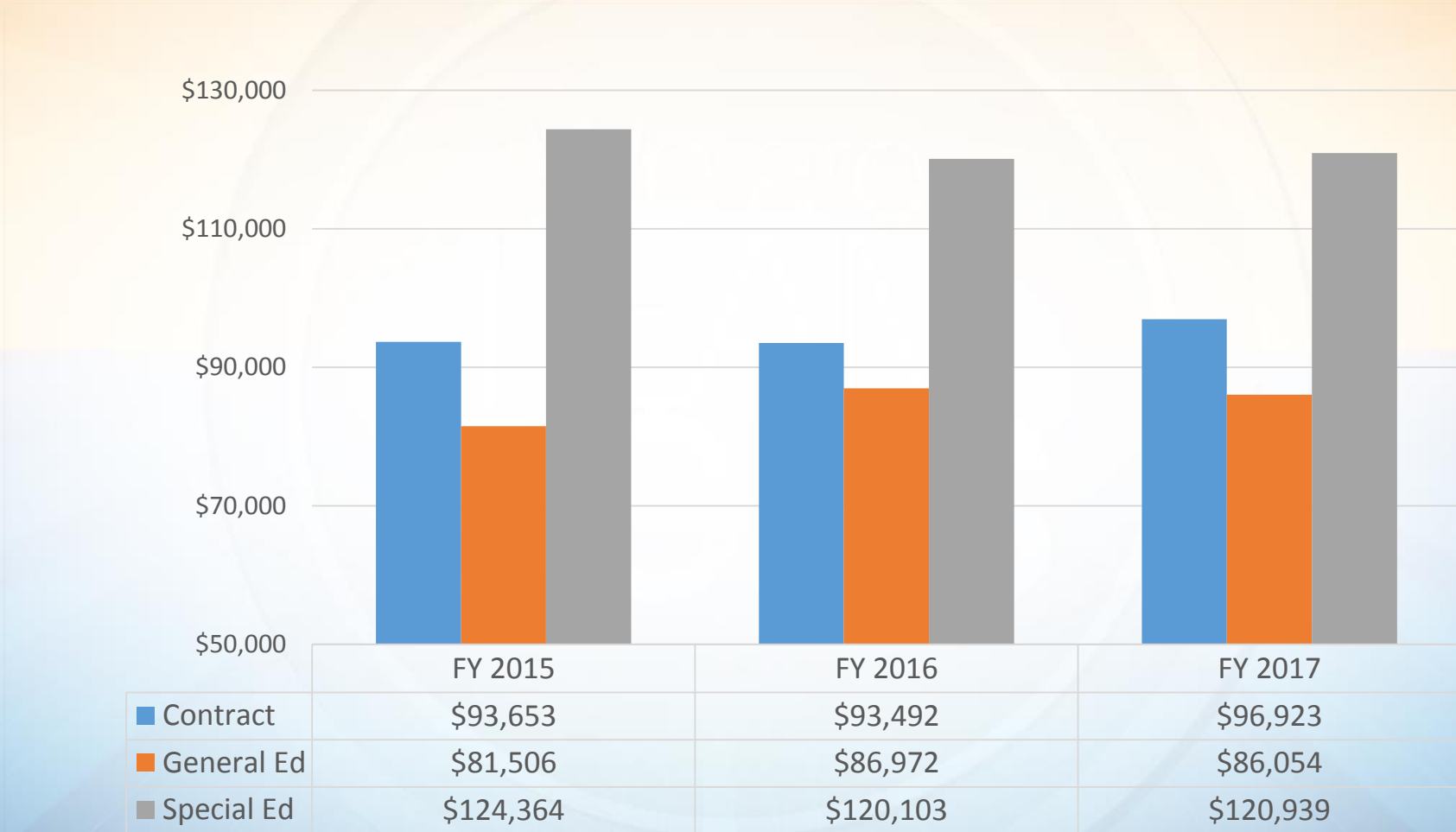
EFFICIENCY





Average Annual Cost Per Route

EFFICIENCY



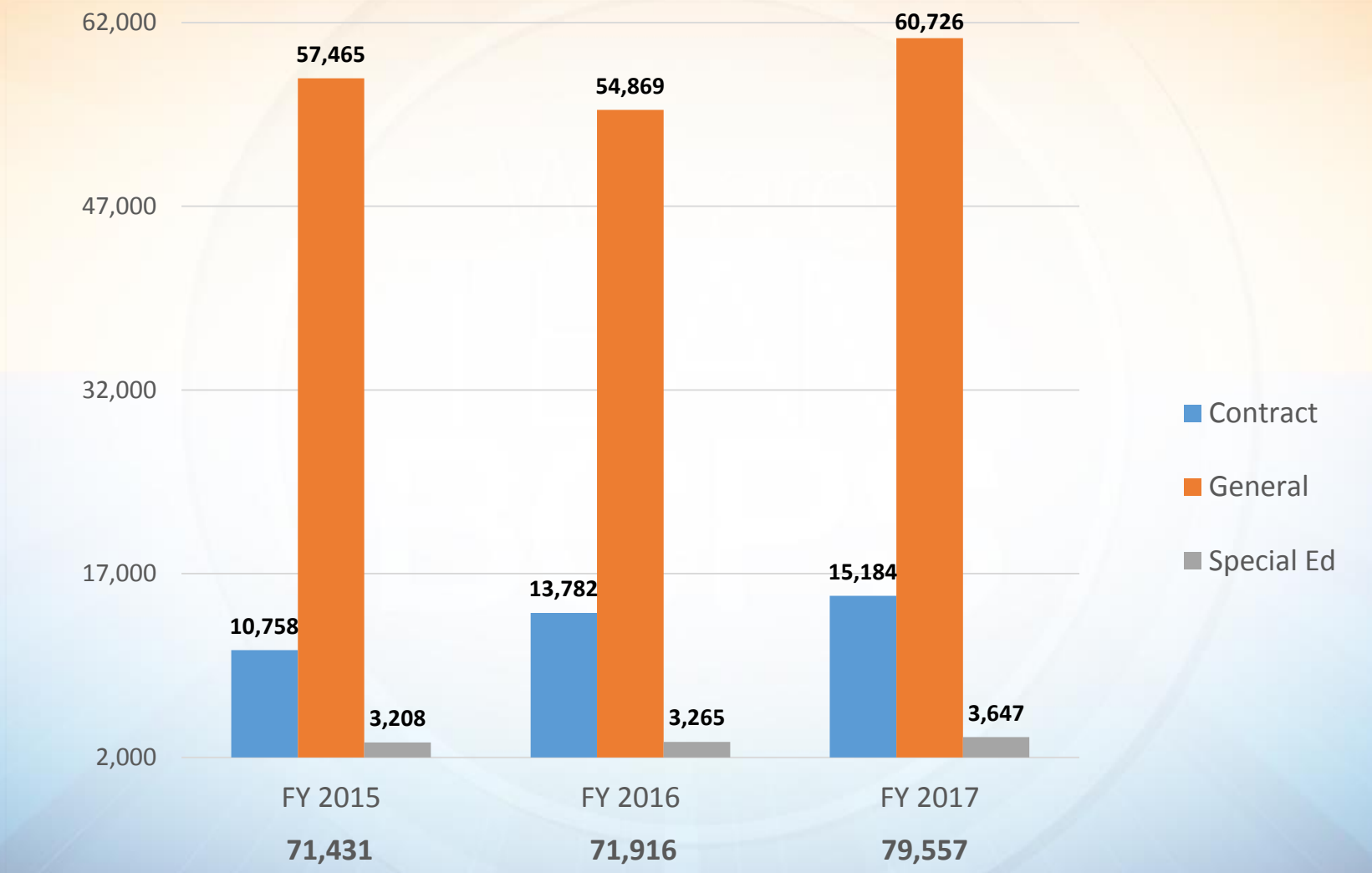
•The total cost used to calculate these figures consists of Office of Transportation operating, salary, and benefit expenses excluding all costs associated with maintenance on automobiles.





Number of Students Transported

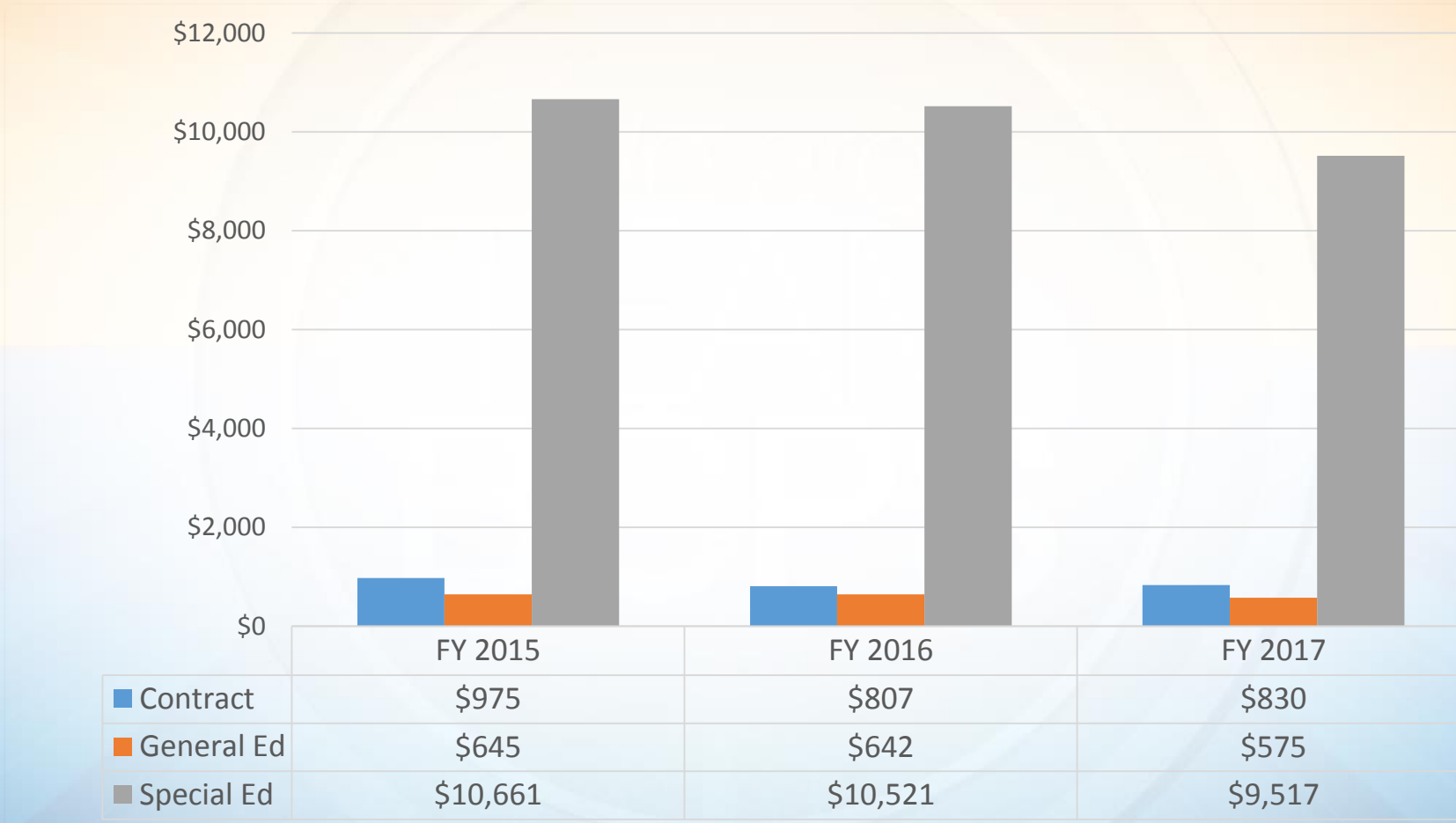
EFFICIENCY





Average Annual Cost Per Student

EFFICIENCY



•The total cost used to calculate these figures consists of Office of Transportation operating, salary, and benefit expenses excluding all costs associated with maintenance on automobiles.





Recruitment and Retention

Baltimore County Public Schools



School Bus Drivers and Attendants NEEDED!

Come Join Our Team!

NEXT RECRUITMENT SESSION
October 27, 2017, starting at 1:00 pm*
 Baltimore County Workforce Development Center – Eastpoint
 7930 Eastern Avenue, Baltimore, Maryland, 21224
 * INVITATION ONLY

PAID training available for successful candidates.
 Prior online application for Trainee Bus Driver or Trainee Bus Attendant is required for attendance. Apply online at www.bcps.org/jobs.

APPLICANTS MUST BRING:

- **Bus Driver:** Copy of high school diploma/GED
- **Bus Driver:** Complete driving record (from the MVA kiosks)
- **All:** Driver's license or State ID (Bus Drivers must be at least 21 years of age)

The Board of Education of Baltimore County does not discriminate on the basis of race, color, religion, sex, national origin, age, marital status, sexual orientation, gender identity, genetic information, disability, or veteran status in matters affecting employment or in providing access to educational programs or activities and provides equal access to the Boy Scouts and other designated youth groups. Inquiries regarding the Board's nondiscrimination policies should be directed to: EEO Officer, Office of Equal Employment Opportunity, Baltimore County Public Schools, 6901 Charles Street, Building B, Towson, Maryland 21284 (443-809-8937).

**For more information, contact the Office of Staffing,
 Baltimore County Public Schools, 443-809-7872.**






Bus Driver Hiring Timeline

- Driver applicant submits an application and is invited to attend a recruitment session
 - Required documentation:
 - High school diploma, GED, or transcript
 - Complete driving history
 - Mercy pre-employment physical and drug test
 - Fingerprinting
- 40 hours of classroom instruction
- 20 hours of behind-the-wheel instruction
- Pass the MVA test, and receive actual license to begin driving
- Entire process can take between 4 and 12 weeks





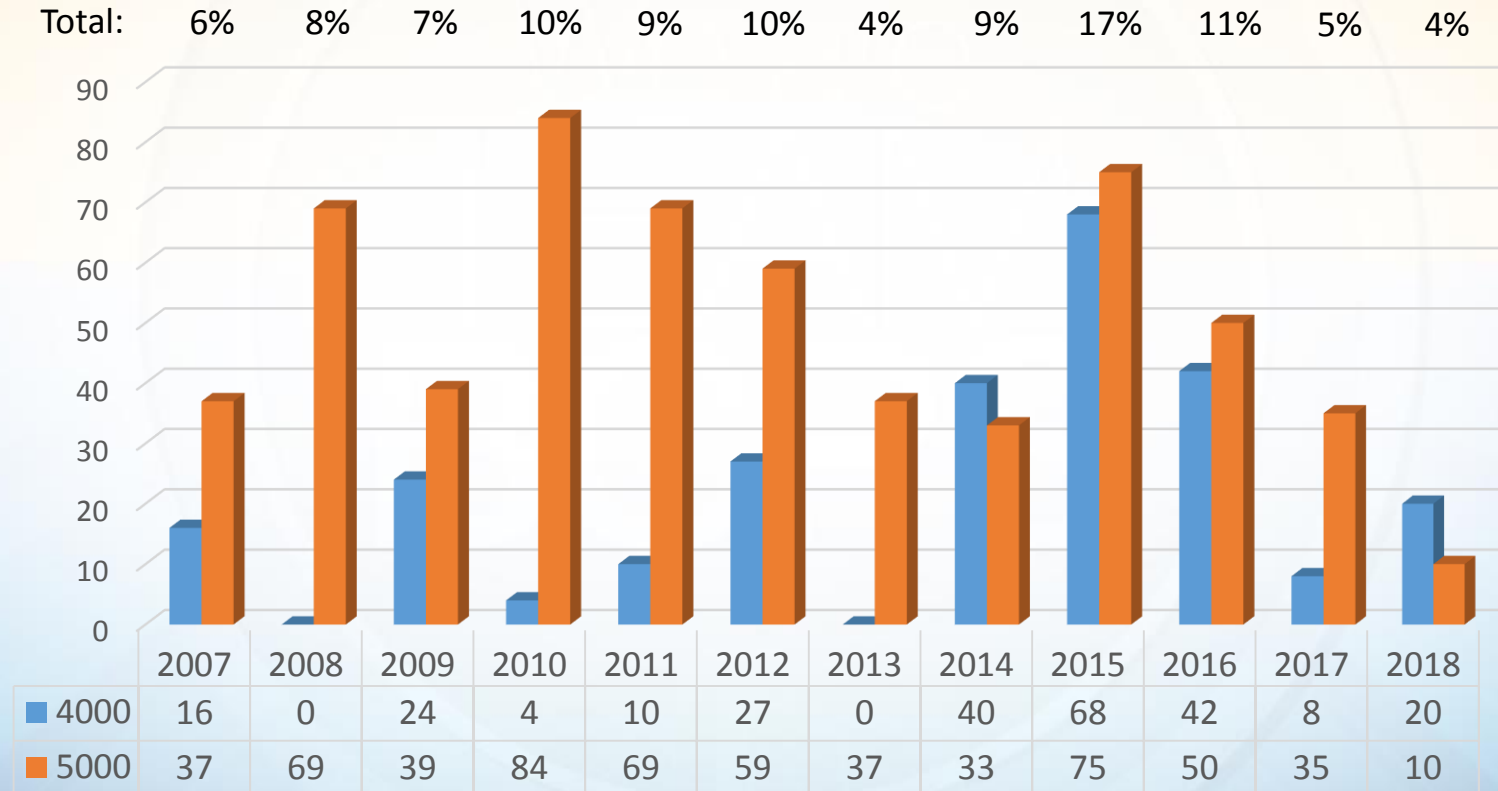
Bus Types In Our Fleet

4000 Series and 5000 Series





Bus Inventory by Year Purchased

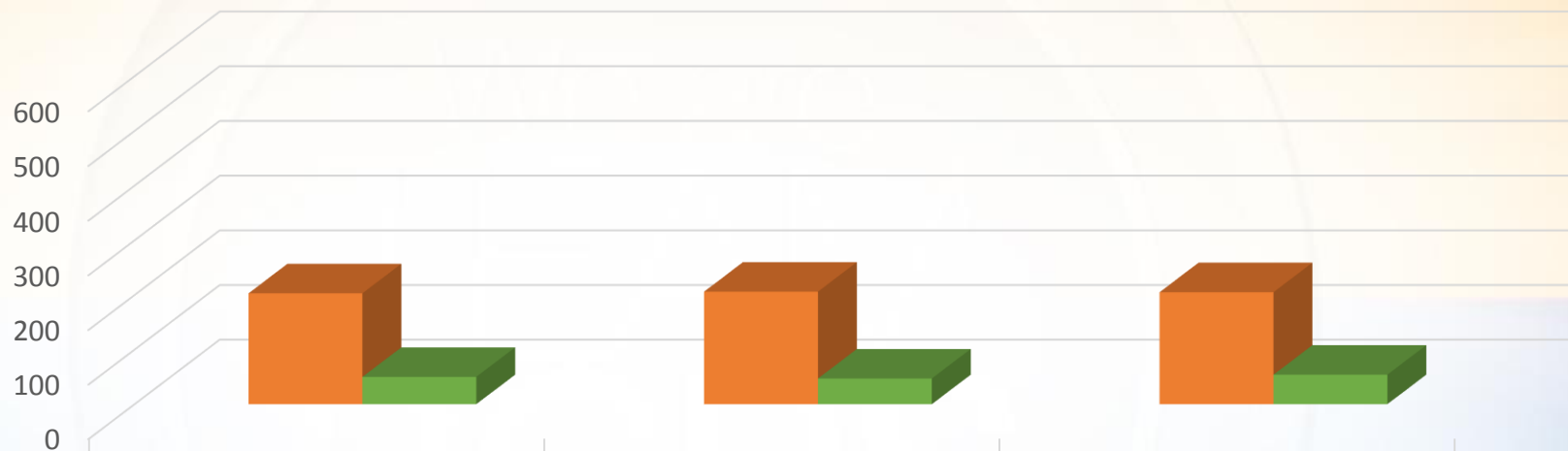




Bus Fleet: Active and Spare w/ Spare Ratio



4000 Series (Special Needs Bus)



	FY 2016	FY 2017	FY 2018
4000 Total	253	253	259
4000 Active	203	206	205
4000 Spare	50	47	54
4000 Spare Ratio	24.6%	22.8%	26.3%

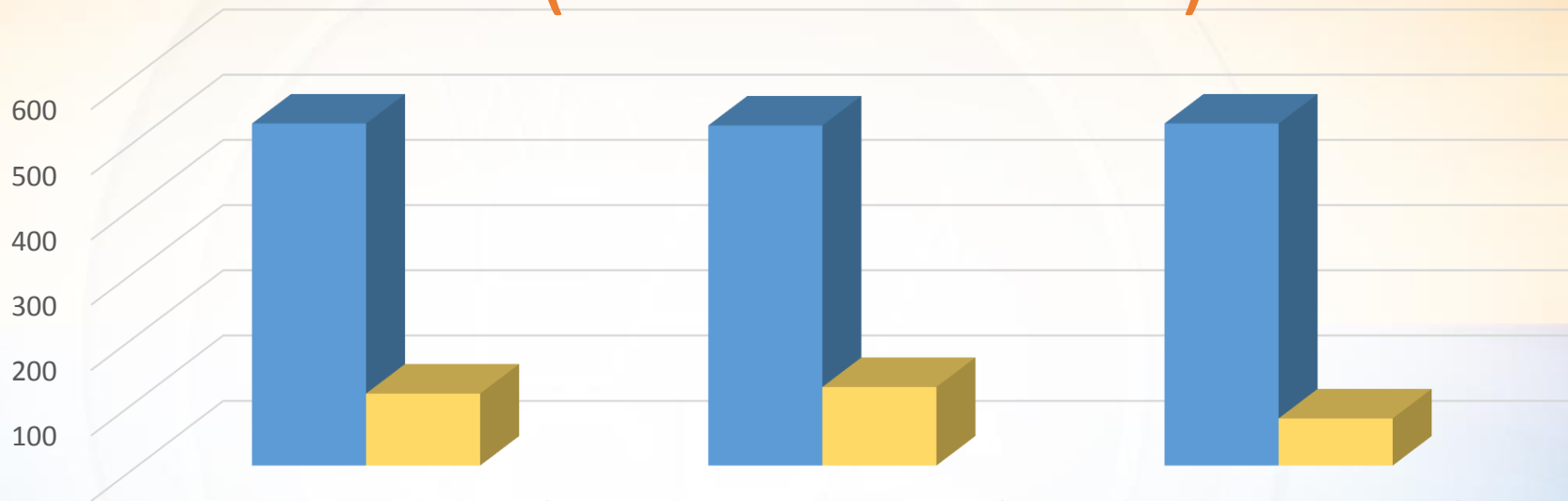




Bus Fleet: Active and Spare w/ Spare Ratio



5000 Series (General Ed Bus)



	FY 2016	FY 2017	FY 2018
5000 Total	634	641	596
5000 Active	524	521	524
5000 Spare	110	120	72
5000 Spare Ratio	17.4%	18.7%	12.1%



Maryland State Department of Education

Overview of School Bus Types

School Vehicle Driver

- Any individual that is assigned to drive a school bus must have a CDL and Passenger and School Bus endorsements
 - Regardless of passenger size or build.
 - Must follow federal and State laws regarding annual physical, drug tests, classroom instruction, etc...

Type A School Bus

A Type “A” school bus is a conversion or bus constructed utilizing a cutaway front-section vehicle with a left side driver’s door. Designed for carrying more than 10 persons.



Type A School Bus

This definition includes two classifications:

1. Type A-1, with a Gross Vehicle Weight Rating (GVWR) of 14,500 pounds or less; and
2. Type A-2, with a GVWR greater than 14,500 and less than or equal to 21,500 pounds.



Type B School Bus

A Type “B” school bus is constructed utilizing a stripped chassis. The entrance door is behind the front wheels. **Part of the engine is beneath and/or behind the windshield and beside the driver’s seat.**



Type B School Bus

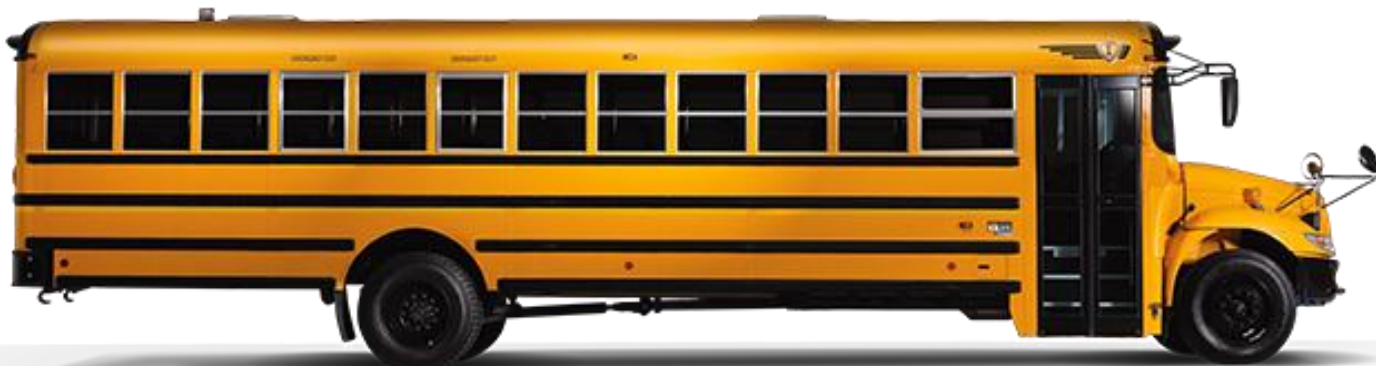
This definition includes two classifications:

1. Type B-1, with a GVWR of 10,000 pounds or less; and
2. Type B-2, with a GVWR greater than 10,000 pounds.



Type C School Bus

A Type “C” school bus (also known as a conventional school bus) is constructed utilizing a chassis with a hood and front fender assembly. All of the engine is in front of the windshield and the entrance door is behind the front wheels. This type also includes cutaway truck chassis or truck chassis with cab with or without a left side door and a GVWR greater than 21,500 pounds.



Type D School Bus

A Type “D” school bus is constructed utilizing a stripped chassis. The entrance door is ahead of the front wheels; also known as rear or front engine transit style school bus



Length of Operation

- A school vehicle may not be used for more than 12 years,
 - (from the date it was put into service)
 - Unless the conditions for its extended use are satisfied under Annotated Code.
- A school vehicle may not be used to transport students after its 15th year of operation.

MSDE Waiver Request

- Under COMAR 13A.06.07.11 General Standards.
 - C. Vehicles other than Type I or Type II school vehicles may be used if:
 - (1) Special approval in writing has been given by the State Superintendent of Schools, consistent with the requirements of Transportation Article, §11-154(b)(2), Annotated Code of Maryland;
 - (2) The vehicle is a taxicab;
 - (3) Only one student is transported; or
 - (4) The vehicle used is a commercial motor coach.

MSDE Waiver Request

- (1) Special approval in writing has been given by the State Superintendent of Schools, consistent with the requirements of Transportation Article, §11-154(b)(2), Annotated Code of Maryland;
 - This is an annual requirement that shall be done before the start of each school year.
 - Each waiver should indicate what type of vehicle is expected to be used.
 - It should also include information as to what safety measures will be followed to ensure oversight of drivers and vehicle safety.
 - All vehicles must meet the standards set forth by Maryland Annotated Code §§ 22-412.2 and 22-412.3
 - Child safety seats and Mandatory seat belt use



Multifunction School Activity Bus

A school bus whose purposes do not include transporting students to and from home or school bus stops, as defined in 49 CFR 571.3. This subcategory of school bus meets all FMVSS for school buses except the traffic control requirements (alternately flashing signal and stop arm).



Approved Vehicles

- Under COMAR 13A.06.07.11 General Standards.
 - C. Vehicles other than Type I or Type II school vehicles may be used if:
 - (1) Special approval in writing has been given by the State Superintendent of Schools, consistent with the requirements of Transportation Article, §11-154(b)(2), Annotated Code of Maryland;
 - (2) The vehicle is a taxicab;
 - (3) Only one student is transported; or
 - (4) The vehicle used is a commercial motor coach.

Taxis

(overseen by the Public Services Commission)

- The number of students per Taxi should not exceed the number of seat belts
- There is a max number of seven people per taxi



Taxi Vans

- ❑ No difference compared to taxi cabs
- ❑ Does not need to go through the MSDE waiver process



Approved Vehicles

- Under COMAR 13A.06.07.11 General Standards.
 - C. Vehicles other than Type I or Type II school vehicles may be used if:
 - (1) Special approval in writing has been given by the State Superintendent of Schools, consistent with the requirements of Transportation Article, §11-154(b)(2), Annotated Code of Maryland;
 - (2) The vehicle is a taxicab;
 - (3) Only one student is transported; or
 - (4) The vehicle used is a commercial motor coach.

Commercial Motor Coach

(a) Is at least 26,000 pounds gross vehicle weight;

(b) Has a minimum of three axles;

(c) Carries a minimum of 16 passengers, including the driver; and

(d) May be equipped with a restroom.



Federal Prohibited Vehicles

- **SEC. 10309. 15-PASSENGER VAN SAFETY**
 - The Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) was signed into law on August 10, 2005.
 - Federal statute prohibits schools or school systems from purchasing or leasing new 15-passenger vans that do not conform with federal motor vehicle standards for school buses and multifunction school activity buses



Vehicle Turning Radius



Tail-swing

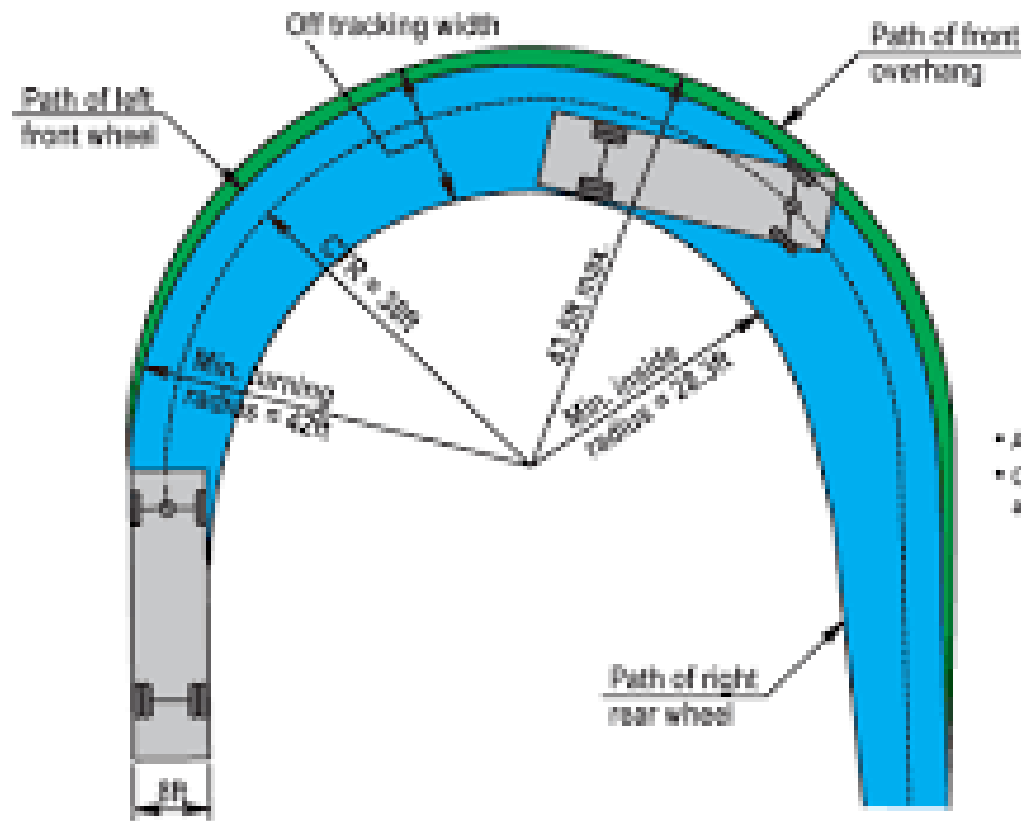


Wheelbase



Overhang

Vehicle Turning Radius



- Assumed steering angle is 31.7°
- CTR = Center line turning radius at front axle

Cost

- Type A School bus
 - \$50,000
- Type B school bus (not common in MD)
 - \$70,000
- Type C School Bus
 - \$90,000
- Type D School Bus
 - \$100,000+

Cost per student

- The larger the Bus capacity, the lower the cost per student if the bus is kept near or at capacity.
- According to the American School Bus Council estimates, most school buses average around 7 mpg assuming large capacity buses with diesel engines.

Cost per student

- The smaller the bus capacity, the higher the cost per student as more vehicles and drivers are needed to transport the same number of students
- Fuel consumption remains similar across most diesel vehicles, regardless of size.

Safety of the School Bus

- Modern school buses are equipped with more safety features than most other large vehicles. The size of the school bus alone gives it an important advantage in all but the most catastrophic circumstances.
- Some key safety requirements include:

Safety of the School Bus



Special Mirrors

Additional mirrors that allow the driver to see all critical areas directly in front of and along both sides of the school bus.

Warning lights

Lights and reflective devices that indicate to motorists when the bus is loading and unloading passengers.

Emergency exits

Several emergency exits, based on the capacity of the bus. Can be located on the roof, rear, or side of the bus, as well as emergency windows.

Special passenger crash protection

Well-padded, high back, energy absorbing seats as well as special requirements for wheelchair restraint systems. Interiors are designed to reduce the chances of injury caused by sharp edges or body panels that may tear loose in a crash.



Safety of the School Bus



School bus Yellow

School buses are universally painted “School bus yellow” to allow for motorists to easily identify vehicles that are designated to pick up or drop off students.

Rollover protection

Reduces the likelihood of a roof collapse and allows for operable emergency exits even after the roof is subject to extreme forces.

Better brakes

Brake systems that enable the bus to stop in a shorter distance than other large vehicles.

Swing-out crossing arm

A crossing arm that extends out to the left side of the bus to warn motorists when the bus is loading or unloading passengers

Fuel System Protection

Protected fuel tanks and fuel pump, fuel delivery system, emissions control lines and connections to protect against fuel spills in severe crashes.



Safety of the School Bus

- 115 fatal crashes involved a school bus on average each year—which is 0.3 percent of the 34,835 total fatal motor-vehicle crashes on average each year.
- Of the 115 average fatal school bus accidents:
 - 9% - Occupants of school transportation vehicles
 - 20% - Non-occupants (pedestrians, bicyclists, etc.)
 - 70% - Occupants of other vehicles involved

Safety of the School Bus

- That means that fatalities on school buses accounts for:

0.03%

of Fatal Motor Vehicle Crashes

Summery

- ❑ The School Bus is the safest form of transportation to-and-from school.
- ❑ Maryland law prohibits school systems from using any other owned vehicles for to-and-from school transportation for multiple students.
- ❑ Changing the size of the fleet vehicles might increase maneuverability but also increase operating costs.

BALTIMORE CITY --- PUBLIC SCHOOLS

1

Distance and Network Analysis on Citywide Programs

City Schools' Transportation Workgroup
June 28, 2018

Dr. Sonja Brookins Santelises
Chief Executive Officer, Baltimore City Public Schools

Dr. Lynette Washington, Acting Chief Operations Officer
Dr. Nichole Stewart, Director of Facilities Planning

Topics of Discussion

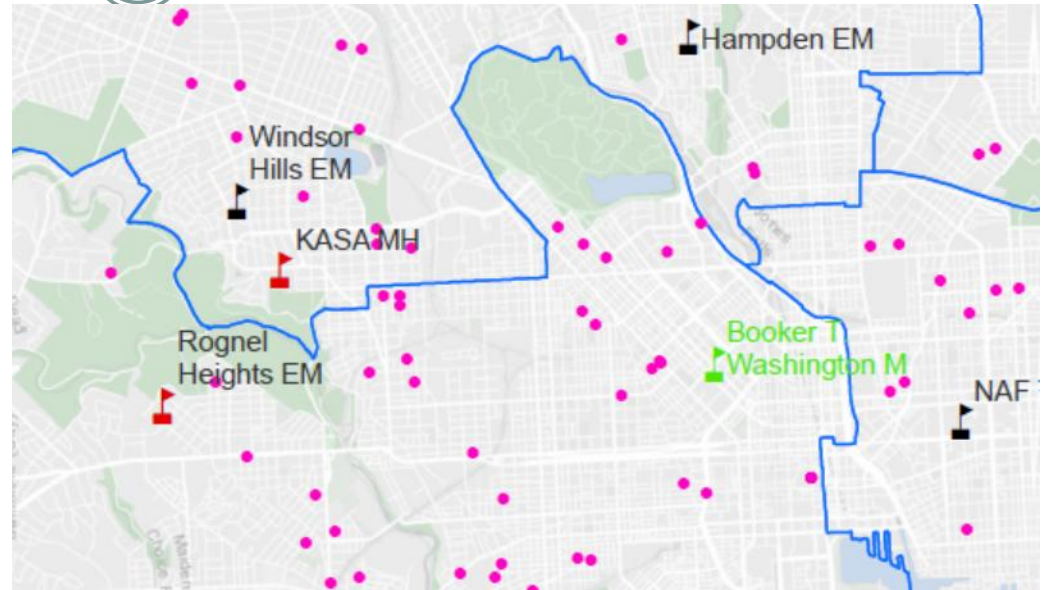
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- Annual Program Movement Process
- Purpose for the Distance and Network Analysis
- Network Analysis Findings
 - **Citywide program (elementary grades)**
 - **Citywide program (middle grades)**
 - **Citywide program (high school grades)**
- Summary and Implications
- Next Steps

Program Movement Process

3

- Review citywide program locations and student enrollment
- Make recommendations for program movement to more efficiently utilize the programs and better serve students



- Life Skills MS Students
- Life Skills MS Programs
- Life Skills MS Programs to Close/Relocate
- Life Skills MS Relocation Sites

Distance and Network Analysis

4

Key Question: How does citywide program placement and student assignment affect transportation?

Methodology and Data Used

5

Methodology

- **Comparison of current and closest program distances to determine how much farther students are traveling to current locations**
- **Utilization of programs if students were attending their closest programs**

9/30/17 Data included:

- **Students enrolled in citywide programs (PAL, ED PRIDE, and Life Skills) by grade band, grades 1 through 12**
- **Citywide program capacity (number of seats per citywide program per school)**
- **Program utilization (students enrolled versus the number of seats available)**

Caveats Considered in Analysis

6

- Walking distance, not the distance traveled on actual transportation routes
- Elementary students are not assigned based on choice
 - **Assumes students should be assigned to program nearest to home**
- Middle and high school students participate in choice

Elementary Grade Citywide Programs Attending Closest Program (based on 9/30/17 data)

7

Program	Number of ES Students Enrolled	# Who DO NOT Attend Closest School	% ES Students Who DO NOT Attend Closest School
ED PRIDE	97	49	51%
Life Skills	108	61	56%
PAL	122	77	63%

As illustrated in the table above, more than half of elementary students enrolled in the three citywide programs do not attend the program closest to their home address

Elementary Grade Citywide Programs Comparing Current and Closest

8

CURRENT PROGRAMS (GRADES 1-5)

Walking Distance	ED PRIDE Students	ED PRIDE %	Life Skills Students	Life Skills %	PAL Students	PAL %
< 1.0 Miles	12	14%	13	13%	10	8%
1.1 - 2.0 Miles	20	24%	13	13%	18	15%
2.1 - 3.0 Miles	18	21%	18	18%	34	29%
3.1 - 4.0 Miles	17	20%	18	18%	19	16%
4.1 - 5.0 Miles	8	9%	19	19%	17	14%
5.1 + Miles	<u>10</u>	12%	<u>21</u>	21%	<u>20</u>	17%
Not Mapped	12		6		6	
	85		102		118	

CLOSEST PROGRAMS (GRADES 1-5)

Walking Distance	ED PRIDE Students	ED PRIDE %	Life Skills Students	Life Skills %	PAL Students	PAL %
< 1.0 Miles	17	20%	19	19%	31	26%
1.1 - 2.0 Miles	30	35%	29	28%	41	35%
2.1 - 3.0 Miles	20	24%	25	25%	27	23%
3.1 - 4.0 Miles	15	18%	21	21%	11	9%
4.1 - 5.0 Miles	1	1%	7	7%	8	7%
5.1 + Miles	<u>2</u>	2%	<u>1</u>	1%	<u>0</u>	0%
Not Mapped	12		6		6	
	85		102		118	

Program	Avg. Commute	
	Current Assignment	Closest Assignment
PAL E	3.3	1.77
Life Skills E	3.48	2.21
Pride E	2.87	1.87

Elementary Grade Citywide Programs Examples

9

- Two PAL programs (Hilton E #21 and James Mosher E #144) have the highest percentage of students not attending the closest PAL programs

Program	Current Assignment			Closest Assignment		
	No. of PAL kids	Utilization	Avg. Commute	No. of PAL kids	Utilization	Avg. Commute
144 J. Mosher E	13	54%	2.86	17	71%	1.2
21 Hilton E	15	63%	3.19	12	50%	1.2

Elementary Grade Citywide Programs

What Impacts Trends? based on 4/9/18 data

10

- Different pickup address than home address?
 - **116 Elementary PAL students**
 - **87 same address as pick up; 29 different address**
- Students who move after they are placed?
 - **44 students enrolled during the SY17-18 school year**
 - **38 have same address since 9/30**
 - **23 not attending closest program (same address when placed)**
 - Mosher=0 of 3 at closest
 - Hilton=4 at closest, 4 not at closest

Middle Grade Citywide Programs (based on 9/30/17 data)

Prog No	MS PRIDE Prog	MS Classes	MS Seats	MS Students Enrolled	MS Excess Seats	Current Prog Util	Prog Util if Closest School
75	Calverton	3	36	14	22	39%	83%
76	Francis S Key	3	36	26	10	72%	3%
130	Booker T	3	36	15	21	42%	106%
164	Arundel	2	24	15	9	63%	71%
210	Hazelwood	2	24	18	6	75%	50%
235	Glenmount	3	36	24	12	67%	28%

	Avg. Commute	
Program	Current Assignment	Closest Assignment
MS Pride	3.83	2.03

Middle grade students participate in the choice process. If choice were removed from the equation, average commute would decrease from 3.83 miles to 2.03 miles

Middle Grade Citywide Programs

What Impacts Trends?

12

- Quality (perception and reality)?
 - **School Quality Measure: 20% Learning Environment, 40% Achievement, and 40% Student Growth and College and Career Readiness Indicators.**

Not Effective: 1 < 50%

Developing: 2 < 65%

Effective: 3 < 80%

Highly Effective: 4 > = 80%

School	Name	School Quality Rating	Current Prog Util	Prog Util if Closest School
75	Calverton Elementary/Middle	2	39%	83%
76	Francis Scott Key Elementary/Middle	3	72%	3%
130	Booker T. Washington Middle	1	42%	106%
164	Arundel Elementary/Middle	1	63%	71%
210	Hazelwood Elementary/Middle	2	75%	50%
235	Glenmount Elementary/Middle	3	67%	28%

High School Grade Citywide Programs

(based on 9/30/17 data)

13

LIFESKILLS 9TH GRADERS

Program No.	Program Name	Commute of all 9th graders	No. of all 9th graders	Commute of Lifeskills 9th graders	No. of Life Skills 9th graders	Commute difference btw Lifeskills + all 9th graders
410	Mergenthaler (Mer-Vo) H	3.5	492	2.3	5	(1.17)
341	REACH!	2.6	166	1.8	2	(0.74)
342	KASA MH	3.2	71	2.7	3	(0.47)
405	Patterson H	3.1	360	2.8	4	(0.31)
239	Ben Franklin H	3.0	170	3.4	5	0.43
400	Edmondson-Westside H	3.5	225	4.3	6	0.76
325	ConneXions MH	3.1	88	4.2	7	1.15
421	Natl. Academy Foundation (NAF) MH	2.4	152	3.8	4	1.31
Totals		3.1	1,724	3.4	36	

High school grade students also participate in the choice process. The table reflects Life Skills students in the 9th grade compared to all 9th graders attending the same schools where the Life Skills programs are located. The travel time for students in the citywide program is slightly longer (.3 miles)

High School Grade Citywide Programs

What Impacts Trends?

14

- Dispersion of Students, Choice, and Options?

See Map on Page 6 of 6

Summary and Implications

- **Many elementary students enrolled in citywide programs do not attend their closest programs.**
 - Student mobility and the ability to choose pickup locations are factors but program placements are driving distances traveled
- **Middle school and high school program assignments and travel distances are impacted by options available, program capacity, and student choices**

Next Steps

16

- Deeper Dive! – “Getting to WHY”
- Enhanced annual program movement process
- Exploring tools to assist with program placement

BALTIMORE CITY --- PUBLIC SCHOOLS

1

Students with Disabilities OSE Analysis of Transportation as a Related Service

June 28, 2018

Transportation as a Related Service

Transportation is a related service as defined by 34 CFR 300.34(c)(16) of the IDEA regulations and can include travel to and from school and between schools; travel in and around school buildings; and specialized equipment, such as special or adapted buses, lifts, and ramps.

If the IEP team determines that a child with a disability requires transportation as a related service (34 CFR 300.34(c)(16)) in order to receive a FAPE, or requires supports to participate in integrated transportation with nondisabled children, then the child must receive the necessary transportation or supports at no cost to the parents. 71 Fed. Reg. 46,576 (2006).

IEP Process: Documentation of Discussion

3

The IEP team must consider and document:

- Safety and Disability (impact of disability on safe travel)
- School Placement Location (distance)
- Medical Factors (if related to disability)

Teams must utilize the Eligibility Checklist to guide the discussion and document the decision.

Approval Process

4

When OSE receives a request for transportation for a student with disabilities, and the reason in STS is “IEP”, the approval process is:

- Verify documentation in the closed IEP;
- Review IEP to verify that transportation has been entered as a related service;
- Review documentation of the decision (present level and LRE sections) to verify that the IEP supports the need for transportation

Non-approvals

5

January	February	March	April	May
14	11	7	10	7

Reasons for non-approval:

- Transportation as a related service is not on the IEP;
- Transportation as a related service was ended;
- Student eligible as Homeless but not IEP;
- Student does not have a current IEP in MDOIEP;
- Student no longer attends BCPS;
- IEP does not sufficiently support the need for transportation as a related service.

Bus Transportation for SWD

6

Total Number of Students
with Disabilities

**February 2018 =
12,742**

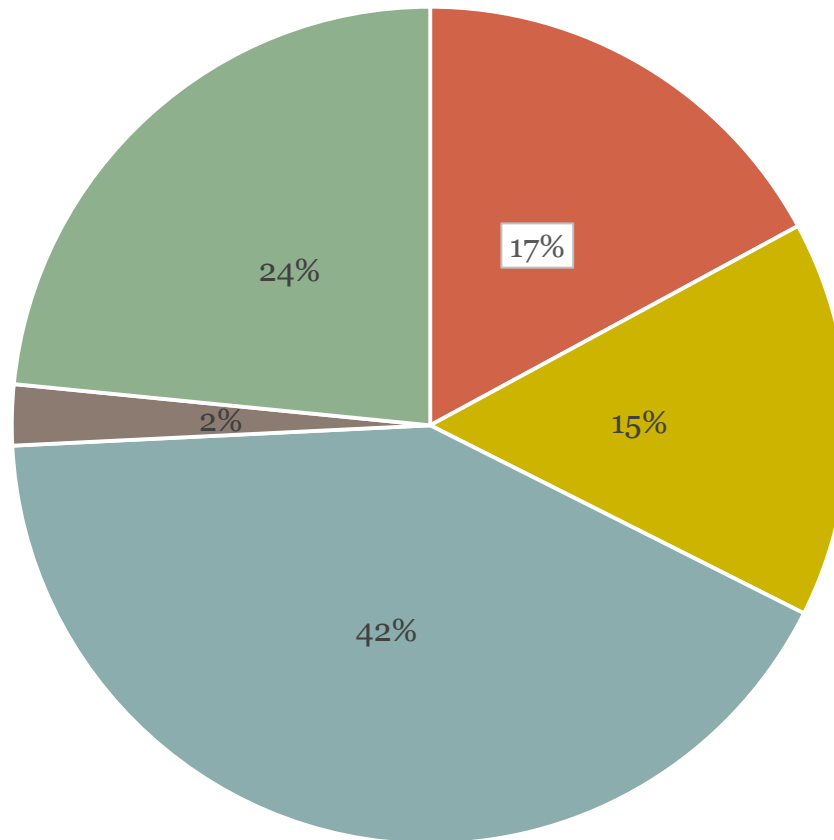
Total Number of SWD
Receiving Bus
Transportation as a
Related Service

**February 2018 =
2,258
(17.8%)**

Students Receiving Transportation as a Related Service

7

As of February 1, 2018, Students with Disabilities receiving bus transportation = 2,258.



■ Special Schools- 386 ■ Nonpublic- 346 ■ Special Programs- 944 ■ Early Learning- 53 ■ Non-program- 529

Desk Audit

8

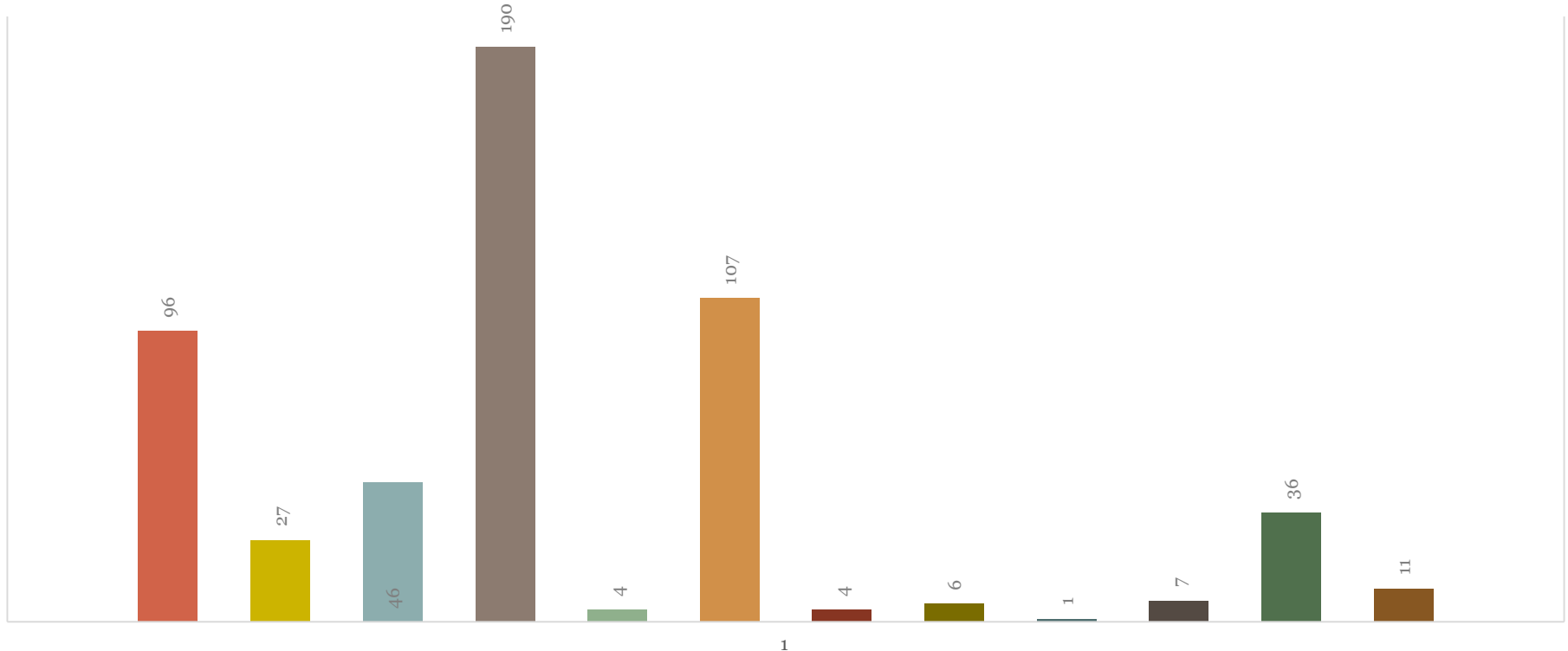
OSE reviewed IEP's and other documentation for the non-program students (529):

- Disability
- Years of Transportation as a Related Service
- Documentation of Need
- Provision of Travel Training

Disabilities of Non-program Students Receiving Bus Transportation

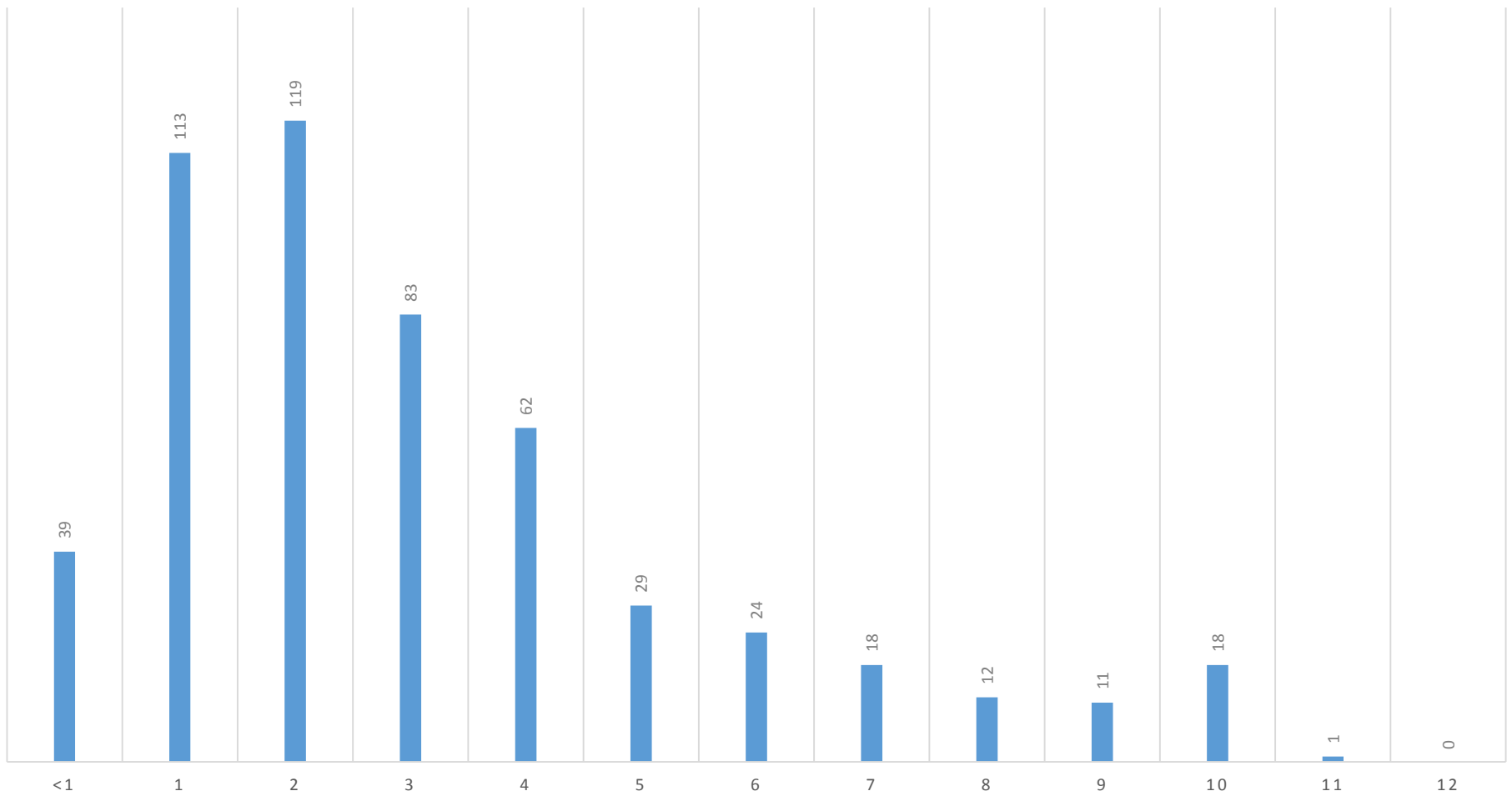
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- Autism
- Intellectual Disability
- Tramatic Brain Injury
- Multiple Disability
- Developmental Delay
- Orthopedically Impaired
- Hearing/ Deaf
- Specific Learning Disability
- Emotional Disability
- Other Health Impairment
- Visual Impaired
- Speech and Language Impaired



Years of Transportation Service

10



Documentation of Need

The desk audit showed much improvement in the documentation of the teams' discussion related to the need for transportation as compared to IEP's reviewed in 2012-2013 during the previous Transportation Corrective Action Plan.

Challenges

12

Citywide program placements after the beginning of the school year, high mobility of our students combined with school choice for transitional students presents challenges in placing students near their residence.

Travel training must be consistently documented and implemented to enable appropriate SWD to be able to access MTA transportation as their non-disabled peers.

Next Steps (SY 2018-19)

13

- Monthly Transportation PD for all IEP Chairs
- Targeted PD for identified schools requiring additional support
- Development of a travel training module for middle and high school students appropriate for potential migration to MTA
- Review of IEP's for students receiving cab service as the mode of transportation and provide guidance to IEP teams
- Review and revise of program placement process based on data as provided by the Planning Office

Conclusions

Students are not receiving transportation as a related service for their entire school careers unless they are attending non public schools, special schools, or placed in a citywide program.

The desk audit shows a continued improvement in team discussion and documentation of determinations of need for transportation, however, additional training/support is required for targeted schools.