INDY CHAMBER & IPS

2013 OPERATIONAL ANALYSIS

CONTENTS

INTRODUCTION

The challenges facing urban public schools systems are well documented. Promoting student learning and achievement in the face of issues related to generational poverty, populations with limited English proficiency, students with special needs and transient home life has increased the complexity and difficulty under which urban schools strive to deliver on their missions. Likewise, larger factors, including the shift of populations moving out of the Indianapolis Public Schools (IPS) district in recent decades, as well as moving away from neighborhood-anchored schools due to bussing to eliminate school segregation, have played a broader role in creating challenges for IPS. In this environment, IPS, as the flagship school system for Indianapolis seeking to prepare and empower students for success in the modern global economy, faces a number of its own specific challenges. At the same time, under the leadership of newly appointed Superintendent Dr. Lewis D. Ferebee, IPS is presently in a singular moment of opportunity to assess its challenges and dramatically improve its ability to serve students and the community.

The Indy Chamber recognizes the broad impact of the challenges facing IPS, as well as the magnitude of opportunity. Our community's ability to support quality of life for all residents, to provide a qualified workforce for local businesses and to attract new human capital and new companies to Indianapolis are, arguably, compromised by the struggles of our school systems, while strengthening our schools and improving student achievement have the opposite effect. As the largest and most academically diverse school system in Central Indiana, IPS is at the center of this issue. In the summer of 2013, the Indy Chamber was approached by administrative and elected board leadership of IPS to partner in identifying operational efficiencies and industry-specific best practices to help solve a $30 million budget deficit forecasted for fiscal year 2014-2015. Such efforts had been previously recommended by the Indy Chamber to IPS administrative leadership as a condition of Indy Chamber support for the IPS capital improvement plan bond issuance.

The outcome of this effort is the IPS Operational Analysis which creates a collaborative effort aligning IPS, the Indy Chamber and business leaders from across Indianapolis to focus acutely on operational excellence for IPS.

MISSION:

Conduct operational analysis in conjunction with IPS administrative and board leadership to produce a set of tangible recommendations regarding operational excellence, opportunities for significant savings, and opportunities for redeployment of resources to maximize dollars flowing to the classroom in a sustainable manner. Areas of study include: finance, human resources, information technology, facilities, and transportation.

GOALS:

- Provide recommendations to IPS leadership that provide a path to operational excellence.

- Engage and educate Indy Chamber leadership on current IPS operational issues and findings of operational analysis

- Engage and educate community stakeholders

- Encourage stakeholder support for recommendations to ensure implementation

Education is a complex subject with a wide array of viewpoints and philosophies. The IPS Operational Analysis endeavors to set aside matters of academic performance, curriculum and education policy and reform to review and make recommendations specifically on operational issues – facilities, transportation, information technology, human resources, finance, etc.

The aim of this IPS Operational Analysis is to conduct an analysis in conjunction with IPS administrative and board leadership to produce a set of tangible recommendations for operational excellence, opportunities for significant cost savings, and opportunities for redeployment of resources to maximize dollars directed toward success for students in the classroom, and to do so in a sustainable manner.

Extending from the core goal to support student achievement through operational improvements, this IPS Operational Analysis also serves to engage and educate Indy Chamber leadership on IPS operational issues, including the system's challenges as well as successes. This informational aspect of the project extends to community leaders and stakeholders. In addition, by engaging volunteers from the Indy Chamber, this project also expands to provide IPS with new stakeholders and contributors, as well as creates increased connectivity between IPS and the Indy Chamber. This report is only the first step; the Indy Chamber is committed to continuing our partnership with IPS and pledges to remain engaged to provide assistance wherever possible.

ACKNOWLEDGEMENTS

The Indy Chamber and IPS recognize and appreciate the support of volunteers to the IPS Operational Analysis. The following individuals gave their time, energy and subject matter expertise toward operational improvements for IPS and toward the success of students and our community.

This project was co-chaired by David Lewis, Eli Lilly and Company, and Joe Slash, Indianapolis Urban League. Indy Chamber staff members Mark Fisher, vice president of government relations and policy development, and Angela Smith Jones, director of public policy, supported the effort. Volunteers worked within one of four teams: Operations, Human Resources, Finance and Information Technology. The composition of these four teams are listed below.

OPERATIONS (FACILITIES, TRANSPORTATION, ETC.)

David Roberson, Chair	Frost Brown Todd
Diane Arnold	IPS School Board
Joe Arruda	IU Health
Kris Butler	Strategic Capital Partners
Doug Bye	IPS Facilities Management
Jane Cookson	IPS Food Service
Marty Dezelan	Dezelan Insurance Agency
Leigh Riley Evans	Mapleton-Fall Creek Development Corporation
Tricia Frye	IPS Planning
Laura Gray	IPS Operations
Gary Hadley	Eli Lilly and Company
Debra Hineline	IPS Finance
Sandra Hubbard	IPS Finance
Tom John	Ice Miller
Cris Johnston	KSM Consulting
Jeff Kingsbury	Greenstreet Ltd.
Rick Markoff	IUPUI
Joy Mason	Eli Lilly and Company
Chris Mulherin	Eli Lilly and Company
Richard Myers	IPS Operations
Sam Odle	IPS School Board
John Perkins	IPS
Dawn Replogle	URS
William Rossetter	IPS
David Shane	LDI, Ltd.
George Stewart	Embry Riddle
Mike Terry	IndyGo
Christopher Walls	IPS
Samantha Adair-White	IPS School Board
Paul Carpenter-Wilson	IPS
Scott Wood	Siemens AG

HUMAN RESOURCES

Phil Kenney, Chair	FA Wilhelm Construction
Alan Bacon	Harrison College
Bob Bowen	Bowen Engineering
David Dressler	University of Indianapolis
Caitlin Hannon	IPS School Board
Debra Hineline	IPS Finance
Sandra Hubbard	IPS Finance
Cris Johnston	KSM Consulting
Bob Klee	Eli Lilly and Company
Andre Lacy	LDI, Ltd.
Edwina Suit	IPS Human Resources
Dennis Trinkle	Harrison College
Amy Wilson	Frost Brown Todd

FINANCE

Joe Slash, Chair	Indianapolis Urban League
Tom Bedsole	Frost Brown Todd
Brian Henning	Old National Bank
Debra Hineline	IPS Finance
Cris Johnston	KSM Consulting
Fred Mills	Indianapolis Power and Light
Will Wilz	Eli Lilly and Company

INFORMATION TECHNOLOGY

JJ Thompson, Chair	Rook Consulting
Wayne Hawkins	IPS Information Technology
Shannon Morris	Freedom Staffing
Michael Pope	IPS Information Technology
Sherry Shelton	IPS Information Technology
Jeffrey Wooden	Eli Lilly and Company

COMMUNICATIONS AND PUBLIC OUTREACH

Denise Herd	Herd Strategies

Special acknowledgement goes to the staff of IPS for their passionate insight and involvement in the process.

EXECUTIVE SUMMARY AND RECOMMENDATIONS

The Indy Chamber has a long-standing history of advocating on behalf of the Indianapolis business community when it comes to issues that impact the well-being of our economy, our workforce and our future growth. Supporting a city-wide effort to highlight and enhance our economic status around the globe is an effort that includes many facets — not the least of these, building a strong K-12 and post-secondary education structure. As we work to attract business and talent to our region, the Indy Chamber demonstrates that Indianapolis stands behind our educational institutions in providing quality education and opportunity for all students. This includes structural, fiscal and other demands currently occurring throughout our school systems.

Leadership and administrators at IPS understand all too well the fiscal difficulties that have confronted the school system for years. In the attempt to balance funding, the needs of students and the demands of administrative, facilities and transportation expenses, IPS finds itself faced with a forecasted $30 million deficit coming into the 2014-2015 fiscal year. Participation in the IPS Operational Analysis by IPS leaders and staff provided valuable insight into the challenges facing the district, as well as the recommendations. Moreover, Dr. Ferebee's initiative to assess and improve IPS represents tremendous progress for the district. From his 100-day plan and extraordinary engagement with stakeholders, to the creation of his transition team comprised of prestigious national and local leaders, and his forthcoming strategic plan, Dr. Ferebee's leadership and innovation represent positive steps for the district.

Through the IPS Operational Analysis, the Indy Chamber engaged the business community to work alongside IPS in reviewing and analyzing the school system's operations in order to identify potential opportunities for cost savings to address the budget deficit. Over the past eight months, the Indy Chamber convened a series of meetings with business leaders from throughout Marion County in this effort, bringing insight and expertise from leading Central Indiana businesses on ways IPS can reduce costs, with particular emphasis on those associated with the General Fund, in order to get IPS back on strong fiscal ground.

The IPS Operational Analysis focuses exclusively on operational aspects of IPS, including operations (facilities, transportation, etc.), human resources, finance and information technology. Operating on sound financial principles is central to any business and, likewise, central to the success of our public school system, particularly in the face of current challenges facing IPS. The volunteering business leaders were actively engaged in this process to find thoughtful, creative ways to reduce the projected IPS deficit, while putting the best interests of students first. They developed findings and recommendations that represent a range of opportunities including immediate, moderate-term and long-term savings. The following is a comprehensive report on the findings of these groups and their collective recommendations for savings and efficiencies throughout the IPS system.

ABOUT THE RECOMMENDATIONS

As an overarching operational analysis of a complex system like IPS, there are areas of overlap across the different categories. Naturally, reconfigurations in the operations category, including facilities and transportation, have an impact on human resources and finance. The recommendations are designed to provide clear and actionable steps for IPS to evaluate and act upon as it seeks to overcome its budget shortfall. The recommendations for each category reflect the availability of data, as well as the relevance of data with respect to the recommendations.

Additionally, the recommendations have been developed without consideration for changes outside IPS that may positively or negatively impact revenue. The recommendations represent operational best practices, primarily through efficiencies and cost-savings opportunities. As such, with respect to the human resources recommendation, there is an overarching recommendation for IPS to continuously evaluate staffing levels. Employee salaries and benefits represent approximately 90% of the 2013 general fund expenses, the greatest single line item in the operational budget, and the preparers of this report acknowledge the complexity of IPS' student population with regard to students with special needs, free and reduced lunch, etc. As with all recommendations, further collection of data and insights will enhance the positive effect of steps to be taken in human resources.

The recommendations in this report represent the outcome of a voluntary process in a condensed timeline. Continuous data collection and analysis, process improvement and ongoing management toward operational excellence represent an overarching recommendation of this report.

RECOMMENDATIONS

I. OPERATIONS

Facilities and Buildings

A. Immediate

- Engage a real estate adviser, without a vested interest in the outcome or disposition of IPS real estate, to provide an independent opinion of market value of certain assets for consideration by the Board and Administration. These assets include:

    1. The former Coca-Cola Bottling Plant, currently used for transportation maintenance, 901 N. Carrollton Ave.

    2. The former Ford Assembly Building, currently used for storage, 1325 E. Washington St.

    3. School 616, Key Learning Community, 777 White River Parkway West Drive

    4. School 315, Cold Spring Environmental Magnet School, 3650 Cold Spring Rd.

    5. Administrative Building, 120 E. Walnut St.

- Develop a task force of individuals and organizations representing or having expertise in development, civic or community planning, land use or real estate, local universities, businesses, and local government to explore realistic options for creating multi-use facilities in IPS and Indianapolis.

- Conduct energy assessments of buildings in the district, academic and non-academic, with a focus on those that cost IPS the most money to operate per square foot, in order to determine potential energy savings.

B. Strategic

- "Right-Size" the district's facilities based upon capacity, costs and demographic trends.

- Based upon the above-referenced task force recommendations, redevelop appropriate buildings into multi-use facilities.

- Implement energy and resource efficiencies to reduce energy costs.

- Upon making difficult "right-sizing" decisions associated with school and other buildings, evaluate the potential for disposition or redevelopment of real estate holdings.

- Implement a suggested decision-making tool when considering changes within IPS.

Warehouse/Contract Services

A. Immediate

- For all expenditures

    - Develop contract service budgets within available revenue.

    - Implement approval requirements for formal contracts, creation of new positions, new hires, designated service contracts, etc.

    - Manage designated service contracts across cost centers, focusing on meaningful cost reductions.

- Within certain conditions, relocate warehouse operations to an actual warehouse.

- Adopt "best practice" warehousing processes and procedures to achieve quick cost savings.

B. Strategic

- Better leverage expertise within IPS and the Indianapolis community to obtain cost efficiency and effectiveness.

- Incentivize high-performing schools to mentor low-performing schools as an alternative to other more costly approaches.

- Adopt best practice warehousing processes and procedures to institutionalize such practices.

Transportation

    A. Immediate

- Implement a pilot program to utilize IndyGo buses for magnet students needing extracurricular transportation.
- Implement technology update to allow GPS location of buses.

    B. Strategic

- Explore potential maintenance partnerships with the City of Indianapolis and IndyGo.
- Partner with IndyGo for route evaluation study.
- Where possible, transition inefficient routes to IndyGo transportation (i.e., extracurricular routes and "deadhead" routes, which occur when a bus route starts or finishes in a location away from the bus garage).
- Implement a true 3-tier bell system which is three individual start times to the school day which could require fewer buses to support the transportation needs.
- Place Grade 9-12 students outside of a school's home geographic area onto IndyGo buses and fully implement blended routes between IPS and IndyGo.
- Conduct analysis to evaluate the need for an outside bus contractor.

II. HUMAN RESOURCES

    A. Immediate

- Using the Baldrige Criteria 5 Workforce metrics for guidance on key questions regarding workforce engagement, conduct a broad and random employee survey, followed by small focus group discussions, in order to fully incorporate and assess the knowledge and views of employees in order to reveal strengths and areas for improvement within IPS.
- Implement a more rigorous human resource "headcount management" planning process in order to increase parity and improve efficiencies in the district, including benchmarking against comparable urban public schools systems facing similar challenges to those of IPS related to layers of supervision, management spans of control, student/teacher ratios, student/staff ratios, externally-contracted services, etc., followed by action on unexplainable deviations from benchmark data. Improve the recruiting process for all positions in order to attract and retain qualified applicants.
- Improve the performance management process so employees know what is expected of them and are recognized for attainment of goals.

    B. Strategic

- Identify strategies to improve culture and morale.
- Develop talent management/succession planning to identify and develop top performers.
- Review benefits packages to remain competitive and look for efficiencies.
- Ensure the progressive discipline policy is understood by all employees and being applied in a consistent manner.

III. FINANCE

    A. Immediate

- Participate and engage with the Council of the Great City Schools to benchmark and incorporate best practices in finance, procurement and other functions.
- Adopt a by-budget model that matches revenues and expenditures by type and by fund.
- Ensure financial reporting to the Board of School Commissioners contains year-to-date comparison to budget.

B. Strategic

- Create a standardized grants management process.
- Establish revenue generation via grants management, an office of development, an "adopt a school" initiative, utilization of naming rights/sponsorship opportunities and utilization of the IPS artwork collection.
- Ensure the inclusion of the financial management team in spending decisions.
- Review and assess current investment portfolios.

IV. INFORMATION TECHNOLOGY (IT)

A. Immediate

- Align district strategic and technology planning, leveraging a Chief Education Technology Officer role.

B. Strategic (under the direction of the Chief Education Technology Officer)

- Institutionalize Financial Management processes for "Total IT Expenditure Management."
- Implement Information Technology services standards and roadmap.
- Investigate opportunity to leverage synergies of other local government department IT services.
- Investigate opportunity to offer educational IT services beyond IPS district.
- Conduct a detailed business case analysis for payroll processing modernization.
- Conduct a detailed business case analysis for saving opportunities in the areas of Help Desk/Field Support outsourcing and Data Center hosting and support outsourcing.

BACKGROUND INFORMATION

The challenges of Indianapolis Public Schools are shared across urban districts around the country and within Marion County; they mirror the dynamic challenges of the communities they serve. Over the decades, declining population in the central city, particularly families with school-age children, led to a corresponding decline in tax revenue, social capital and political capital, which has effectively hollowed out many once-vibrant neighborhoods.
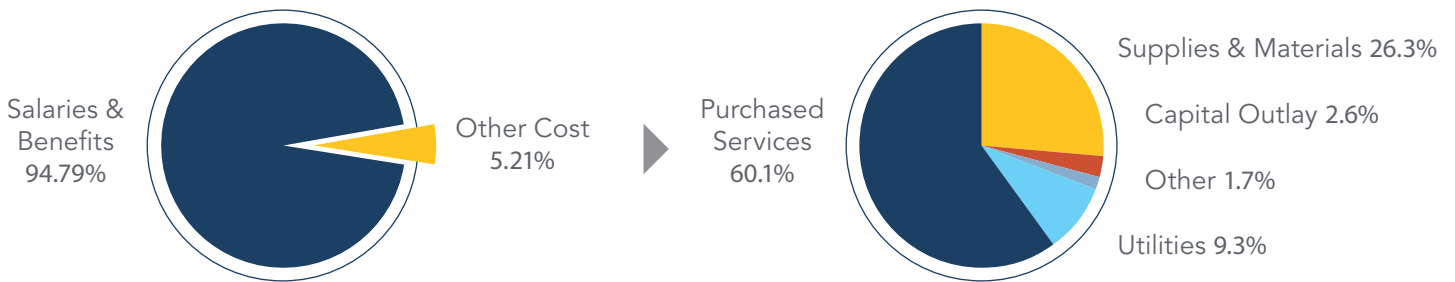
From 1950 to 2010, Center Township population declined 58%, almost 200,000 people, while Marion County and the Indianapolis Metropolitan Statistical Area (MSA) grew by 64% and 132%, respectively.

	Center Township	Marion County	Indianapolis MSA
Population 1950	337,211	551,777	756,281
Population 2010	142,787	903,393	1,756,241
Change 1950-2010	-194,424	351,616	999,960
% Change	-57.7%	63.7%	132.2%

Source: Public Policy Institute, IUPUI

This shift is evident in the excess facility capacity within IPS. Today, IPS schools have a capacity of 64,477 children, but utilization is less than half; only 30,390. Further, educational choice in the form of charter schools took hold in Indiana 10 years ago and that competitive model has also impacted IPS' total enrollment and revenue. It is important to note that IPS does not evaluate available space by seat utilization but by student/teacher ratio. However, IPS is aware of capacity and open seats for each building across the district.

The below chart outlines allocations in the 2013-2014 IPS General Fund. This chart was received from IPS in 2013.

Salaries & Benefits 94.79% Other Cost 5.21% ▶ Purchased Services 60.1% Supplies & Materials 26.3% Capital Outlay 2.6% Other 1.7% Utilities 9.3%

Today, IPS enrollment appears to have stabilized, but underutilized and aging facilities and the associated holding costs remain a distinct challenge and a growing financial burden to the district. Maintenance and operating expenses, as a percentage of general fund expenditures are unsustainably high at 24.42%. As a benchmark, IPS has the fifth highest ratio of maintenance and operating expenses to general fund expenditures among 43 peer school districts around the country.[1]

The IPS facilities portfolio currently includes 9,612,906 square feet and 1,037 acres of real estate. The average age of the 82 IPS facilities is 56 years. In an effort to close a significant budget shortfall, IPS must look to its facilities as a means of cutting operating costs and generating revenue.

But, this challenge is not just about dollars and cents. As major place-based infrastructure and an integral part of the community fabric, public schools can have a significant impact on the social, economic and physical character of a neighborhood. Reinforcing the link between public schools and neighborhoods is not only good education policy, but also good community development policy and practice particularly in disinvested urban areas, the link between public schools and neighborhoods is even more important. Indeed, the success of Indianapolis' public schools is inextricably linked to the success of its neighborhoods and vice versa.

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[1] "Managing for Results in America's Great City Schools: A Report of the Performance Measurement and Benchmarking Project." Council of the Great City Schools, October 2012

Harvard University Professor of Education Mark Warren argues that if urban school reform in the United States is to be successful, it must be linked to the revitalization of the communities around our schools:

> "What sense does it make to try to reform urban schools while the communities around them stagnate or collapse? Conversely, can community building and development efforts succeed in revitalizing inner-city neighborhoods if the public schools within them continue to fail their students? The fates of urban schools and communities are linked, yet school reformers and community builders typically act as if they are not.[2]"

Again, this is a challenge faced by communities, urban and rural, across America, and is not solely an IPS or Indianapolis problem. It is however one that must be confronted by the public, private and philanthropic sectors, because it's not just about education; it's about the perception, and in some cases reality, of the health and quality of our neighborhoods. It's about the Indianapolis brand; our schools are integral to our brand and they speak to the values of our community. Because of the interconnectedness of education with the health and wellness of the City's overall human and physical infrastructure, any redevelopment of the school district must include City and neighborhood leaders as part of the process. Together, we must find the solutions that once implemented will make our City strong. In other words, IPS is not in this alone.

> "Community building must become the heart of any school improvement effort."
>
> ~ Thomas Sergiovanni ~

With the reduction of revenue as a result of property tax caps that force local government units to make difficult choices about the allocation of diminishing resources, the City's administration, community development corporations and neighborhood leaders are striving to redevelop parts of the City to improve infrastructure, enhance housing, eliminate blight and make neighborhoods safe. Any change made to improve the school district should consider efforts by the City of Indianapolis and community partners to attract and retain residential and commercial investment to its core.

Perceptions of crime and safety, followed by quality of local schools, are the two most important factors driving household location decisions. In Central Indiana, 78% of households rated high-quality local schools as very important or somewhat important in choosing where to live. Yet, in Marion County, only 44% of residents are satisfied or very satisfied with the quality of local schools, compared to 73% of Boone County and Johnson County residents and 88% of Hamilton County residents.

The following analysis and recommendations present short- and medium-term strategies that are intended to help address the immediate budget deficit, while also being mindful of the need to positively impact the educational well-being of IPS students. However, there are also systemic, long-term challenges that must be addressed if IPS is to ensure a sustainable future.

In the face of property tax caps, city leaders are striving to elevate assessed value in Marion County; yet even if Marion County assessed value spiked by 50%, this would yield approximately $30 million to $35 million annually in additional property tax revenue which still wouldn't fully close the City's $55 million annual structural deficit. It is within this environment that IPS operates.

It is important to note that IPS is currently engaged, under the leadership of Dr. Ferebee, in a thorough system review and strategic planning process. Additionally, the system demonstrates in numerous programs, school and areas a number of extraordinary success stories.

We are encouraged by recent developments under the leadership of Dr. Ferebee, his leadership team, and the school board to address some of the structural challenges and to ensure that all children have access to a high quality education.

The following sections represent the full depth of analysis and recommendations for each of the four areas: operations, human resources, finance, and information technology.

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[2] Warren, Mark R. "Communities and Schools: A New View of Urban Education Reform," Harvard Educational Review Vol. 75 No. 2 Summer 2005

[3] MIBOR/Indianapolis MPO, "Central Indiana Community Preference Survey," March 2013

OPERATIONS

Over the years, IPS has sold surplus real estate, which has been repositioned or redeveloped to a variety of new uses. Currently, Indiana Code (IC 20-24-1-4) requires public school corporations to make unused facilities available to charter schools for $1.00 for up to two years. This makes the sale of surplus school buildings, for purposes of generating revenue in the short-term, problematic. However, non-school real estate assets do not fall under the same policy.

The Task Force did not conduct an analysis of IPS real estate holdings to evaluate the potential for disposition or redevelopment of all buildings. Such an effort is beyond the scope of this engagement. It is recommended that IPS engage a real estate adviser, without a vested interest in the outcome or disposition of IPS real estate, to provide an independent opinion of market value, for consideration by the Board of Commissioners.

Careful study of data provided for this research presents possible clues for the disposition of five IPS buildings:

- Built in 1929, the former Coca-Cola Bottling Plant (901 N. Carrollton Ave.) is 354,504 square feet and 5.20 acres and currently used for transportation maintenance. The site, with its location along the Mass Avenue corridor and historic architecture, has long been coveted by developers for its redevelopment opportunities.

- Built in 1914, the former Ford Assembly Building (1325 E. Washington St.) is 115,985 square feet and 3.25 acres and currently used for storage. With renewed interest in the East Washington Street corridor, this site has garnered attention from developers for its adaptive reuse potential.

- School 616 (Key Learning Community) is a K-12 magnet that is an F-ranked school for the past two years. Built in 1980, the building is 72% utilized. The land is on a 99-year land lease through the City's Department of Parks and Recreation. More importantly, School 616 sits on 13.5 acres adjacent to White River just south of the GM Stamping Plant, an area planned for redevelopment by the City because of its proximity to downtown Indianapolis. School 616 is leased back to IPS through its building corporation through July 15, 2029.

- School 315 (Cold Spring School) is a C-ranked K-6 magnet school that is 78% utilized with current enrollment at 254 students. Built in 1960, the cost of utilization is $1.33/square foot for the 69,000-square-foot campus, so it is expensive to operate. Yet, this land has value. School 315 is located in the heart of Marian University, a four-year university with plans for expansion despite the fact that its campus is landlocked. School 315 is not bound by the IPS bond deal and is near two A-ranked K-6 grade elementary schools: School 79 has 94 seats available and School 43 has 165 seats available – a total availability of 259 high-performing seats.

- The John Morton Finney Center for Educational Services (120 E. Walnut St.), built in 1967, is 212,520 square feet on 0.5 acre in downtown Indianapolis. Due to its significant footprint in the mile square, there is considerable value in the property's location. It has been reported by site selectors that companies are interested in utilizing and redeveloping the space. Moving to a facility with available space such as the Robert School #97 building on the Near Eastside may be an option for relocation. Such a move would have multiple impacts. The profit from sale of the Walnut Street building would free up funds to be applied to bond repayment and reduction of debt. Second, this transition would further establish the community-centric presence of IPS on the Near Eastside, anchoring a neighborhood and bringing IPS administration more prominently into the community and better connected to the schools that it serves.

Together, the first two sites represent 470,489 square feet of space. IPS should study the opportunities to consolidate and relocate these functions in a more efficient facility and consider the feasibility of selling these properties to pay for the consolidated facility. Because of the significance of these sites to catalyze development, IPS should develop a strategy in close consultation with the City's Department of Metropolitan Development and follow a competitive Request for Proposal (RFP) process for each of these two sites.

Generally, there should be stronger alignment between the City of Indianapolis, community development organizations and IPS in identifying community development strategies that are mutually beneficial to the community and IPS. Such coordination can ensure that schools can continue to be vital anchors for the neighborhood and in some cases, drivers of economic development. For example, Zionsville Community Schools partnered with the Town of Zionsville

and the redevelopment commission to buy 126 acres for $5.7 million. The school district will use 10 acres to build a warehouse and maintenance facility, and the town will take title to the remaining land and subdivide it for commercial development. The town will have a mortgage and will make payments back to the school district.

Schools 616 and 315 represent 176,000 square feet of space and an opportunity for IPS to dispose of property that has value for commercial development and/or community redevelopment. As noted above, School 616 is one of 29 IPS schools owned by its building corporation and serves as security for four different bond issues. In the state of Indiana, most schools corporations pay for significant capital improvements through the lease financing mechanism, which requires a school corporation to transfer title of the renovated or newly constructed properties to a "building corporation" in order to secure the debt and avoid triggering the constitutional debt limitation. In a lease financing, a not-for-profit building corporation has been created for the purpose of "owning" the school facility being financed, issuing bonds, using the proceeds of the bonds to construct/renovate the school facility, and then leasing the school facility back to the school corporation. The school corporation pays lease-rental fees to the building corporation, which then uses the proceeds to pay the debt service on the bonds.

IPS' first three bond issues were authorized under the former petition-remonstrance process and will be paid off in 2020, 2028 and 2032. The last group of bonds was issued in late 2010 following a successful referendum and will not be paid off until 2029. Under the terms of the bond indentures, the building corporation must retain ownership of the properties until the bonds are paid off.

Following is the list of properties owned by the building corporation and their lease expiration dates:

1994 BONDS

Leased Property	Date Released
Florence Fay (21)	1/15/20
Elder W. Diggs (42)	1/15/20
Daniel Webster (46)	1/15/20
William A. Bell (60)	1/15/20
Emma Donnan Middle School (72)	1/15/20
Rousseau McClellan (91)	1/15/20

PHASE I

Leased Property	Date Released
Eleanor Skillen Elementary (34)	1/15/28
James Whitcomb Riley Elementary (43)	1/15/28
Broad Ripple High School	1/15/28
Arlington Community High School	1/15/28
Emmerich Manual High School	1/15/28
James Russell Lowell (51)	1/15/28

Prepared by Umbaugh, January 12, 2011

PHASE II

Leased Property	Date Released
Washington Community School	1/15/20
T.C. Howe Academy	1/15/20
Shortridge High School	1/15/20

PHASE III

Leased Property	Date Released
Thomas D. Gregg (15)	7/15/29
Francis Scott Key (103)	7/15/29
James A. Garfield (31)	7/15/29
Eliza A. Blaker (55)	7/15/29
Anna Brochhausen (88)	7/15/29
H.W. Longfellow (28)	7/15/29
Clarence Farrington (61)	7/15/29
Carl Wilde (79)	7/15/29
William McKinley (39)	7/15/29
Mary E. Nicholson (70)	7/15/29
George Buck (94)	7/15/29
Floro Torrence (83)	7/15/29
Merle Sidener (59)	7/15/29
Key Learning Community (616)	7/15/29

Of the 29 schools listed in the table, five schools are D-rated; 11 schools are F-rated; four schools have been taken over by the State; and one is being used for storage. The indentures do permit IPS to sublease properties owned by a building corporation, subject to certain federal requirements that must be met in order to retain the tax-exempt status of the bonds. It is recommended that a bond attorney be consulted in the event any of these schools are targeted for disposition.

MULTI-USE FACILITIES

Several communities use school facilities for purposes extending beyond the educational needs of a district. These types of collaborations across sectors, cultures and philosophies can lower maintenance and operating costs for the school district. Multi-use facilities can also generate revenue if the district owns a facility that is used for events or activities in which rent or user or admission fees are charged.

For example, in August, 2013, IPS leased 19,900 square feet of space in Gambold Preparatory Magnet High School to Enlace Academy Charter School. The relationship between the schools and the district has been successful to date. The charter school employs a blended learning model that targets immigrant families, and is showing academic success. The school principals are exploring a variety of ways to collaborate to advance the larger goal described above. Most important for the purpose of this report, the recently renegotiated lease will generate revenue of $90,000 per year to the district without increasing direct costs. This is a relatively small sum, but a tremendous start resulting from a desire for both programs to be successful and mutually beneficial. A similar relationship with KIPP Charter School could be explored at Harshman Middle School.

Although IPS does have examples of multi-use facilities throughout its district, more opportunities need to be explored. There are many best practices and program models to provide inspiration for the district:

- Many school districts across the country (including Indiana districts) have built facilities designed for non-school related activities and events, such as performing arts facilities, which provide space for educational programs during the day and then provide a place for community or civic events at night, funded by admission. In New York, for example, public school buildings have even been used as full-service community centers after school, on weekends and during the summer.

- Some school districts have also built other types of facilities — including athletic facilities — that different groups or organizations may rent when the schools are not using the space.

- In Indiana, multi-use facilities such as the Columbus Learning Center in Columbus help communities bring together K-12 students (Bartholomew Consolidated School Corp. and Flat Rock-Hawcreek School Corp.) with higher education and workforce development partners (Ivy Tech Community College, IUPU-Columbus and Purdue University). On the campus of Parkview Hospital, Fort Wayne Community Schools is working with Trine University and Huntington University to occupy space in a former medical office building for allied health programs and dual-credit courses in one of the first examples of a K-12 school district partnering with higher education and a major employer.

- Local governments have partnered with school districts to develop property for multi-use by the district and other public or private organizations. For example, the school district has typically used part of the property for classroom space, while other buildings on the same property are used from retail stores and government services to "wrap-around services" like health care and early childhood or daycare centers. In some cases, the school district and local government, or a partner from the private sector, shared the cost of new construction or remodeling, allowing the school system to provide added classroom space at a much lower cost than the district would have incurred if it would have launched a project on its own.

- In a few places, school districts have partnered with local businesses to develop property and construct new buildings; wherein, the businesses paid for the construction of new facilities and the district leased the space from the businesses.

IMPLEMENTATION CONSIDERATIONS

It is recommended that a coalition of individuals and organizations representing or having expertise in development, civic or community planning, land use or real estate, local universities, businesses, and local government should be formed to explore realistic options for creating multi-use facilities in IPS and Indianapolis. As potential options for multi-use facilities emerge, analyses should be conducted to gauge the fiscal impact the various proposals would have on IPS and the community. That impact may be in the form of cost-savings to IPS and perhaps to other partners involved in a multi-use project, enhanced property values in those situations where land is redeveloped, and/or through the generation of revenue for IPS and possibly others (i.e. the city/county, business partners or other organizations).

Revenue generation potential with a shared-facilities model can be quantified by reviewing successful models around the country. While Chicago and New York City have both leased space to charter schools for years, Denver provides a more compatible model because of its similarity to Indianapolis.

In Denver, it is estimated that charter schools spend $189 per seat when leasing space from a district-owned building. To put this in perspective, IPS estimates it has 24,615 empty seats in the district. If all vacant seats were filled at $189 each, it would supply the district with more than $4.6 million in annual revenue. This example helps begin to quantify the magnitude of the potential revenue stream behind a shared-facilities model, and the need to view these buildings as assets and further explore new community uses for IPS buildings.

Moving to a shared-facilities model would require a significant cultural shift within the district — from the administration to custodial staff. Welcoming high-performing charter schools or private schools as tenants and partners appears, at a glance, like welcoming the enemy to live in your home. However, all parties have the shared goal of providing high quality education to all children, while improving the quality of life for local residents. With these aligned missions at the heart of such a partnership, such a transition is possible. It appears many in the district are prepared to explore the potential.

Case studies exploring programs employed in the Denver and Harlem school districts provide valuable insight to a process that could be used by the coalition and later implemented by IPS:

- Verify the exact number of open seats in the district (Immediate)

- Verify the market rate for excess space (Immediate)

- Develop a matrix to identify optimal uses for excess space by evaluating desirable co-locating options compared to building capacity (ex. Harshman versus IPS #48) (Immediate)

- Identify persistently underperforming schools with the most capacity to be utilized as a multi-use facility (Immediate to Short-Term)

- Develop strategies for organizing student enrollment to maximize the efficiency of operating schools and maximize the potential for leasing excess space to high-performing charters, private schools or other businesses offering a community benefit (Immediate to Mid Term)

- Begin the process of prioritizing opportunities for short-term success by identifying: (Short to Mid-Term)

    o Buildings most conducive to a shared facilities model with minimal retrofitting

    o Existing models in IPS that would be most conducive to a shared-facilities strategy, such as what has occurred with Gambold Prep Buildings

    o Under-utilized space that can be shared with minimal disruption or controversy, such as the Forrest Manor Middle School

    o Transportation routes and costs that could be altered to improve efficiencies

- Partner with the Mayor's Office to solicit proposals for development of innovating and high-performing schools/businesses in these specifically identified spaces. Focus primarily on replicating models that have been proven

successful in Indianapolis or elsewhere. Work with the Mayor's Office to create a specific application cycle for Mayor-sponsored charters with a review team that allows for strategic input from the district as a part of the review and approval process (Mid-Term)

- Identify legislative barriers to successful shared-facilities strategies that would benefit both the district and charters (Immediate and Short-Term):

    o Current legislation granting public school buildings to charters for $1 – this legislation does not take into account facilities owned by building corporations, existing debt obligations, or the incentive it creates for the district to continue operating facilities at less than capacity. Additionally, it doesn't foster a spirit of collaboration across cultures.

    o Advocate legislation that would allow the district to receive facilities and transportation funding for all students in a shared-facilities building, provided this revenue results in below-market rent and the district provides transportation to charter students at below-market rates.

- Work with districts such as Denver, Harlem and Chicago, to identify professional development opportunities for school-level leaders, charter leaders and central administration officials to be trained on best-practices necessary to successfully co-locate in facilities.

- Develop a long-term capital investment strategy to retrofit buildings that could be used by multiple schools if retrofitted with: clear signage, necessary entrances, administrative office space, fire exits, etc.

Under this model, the district would create success measures based on the following:

- The number of unutilized seats in district-owned buildings, with a goal of reducing capacity over a defined number of years.

- The number of seats allocated to high-performing schools, regardless of whether they are district schools, charter schools or any number of hybrids that might grow over time.

- Revenue that returns to the district and cost savings to charters, which can, and would, happen simultaneously.

- Capacity threshold for developing a multi-use facility

Once multi-use options and the corresponding fiscal impacts are determined, the ideas or proposals for carrying out multi-use projects should be presented to the IPS Board of Commissioners by as broad of a spectrum of representatives from the community as possible.

"RIGHT-SIZE" THE DISTRICT

From 1950 to 2010, Center Township population declined 58%, almost 200,000 people, while Marion County and the Indianapolis MSA grew by 64% and 132% respectively. Though Center Township does not exclusively represent the IPS population, it serves as a model for the population shifts in the district overall. This shift in population in Center Township has evidenced itself in the excess facility capacity within IPS. Today, all IPS school facilities have a capacity of 64,477 seats, but utilization is less than half; only 30,390. Given the current financial and educational policy climate, difficult decisions to "right-size" the district must be made.

CAPACITY AND COST CONSIDERATION

The model for education has changed dramatically since many of these buildings were built. Additionally, different teaching philosophies utilize space differently. It is important to note that IPS does not evaluate available space by seat utilization but by student/teacher ratio. However, IPS is aware of capacity and open seats for each building across the district. From the 64,477 total seats, removing non-academic facilities and some schools that have recently been taken over by the state and private education providers, the district has 55,005 available seats and a total enrollment of 30,390, resulting in 24,615 available seats[4]. It must be noted that these numbers and the location of available seats shifts regularly, but not dramatically, due to the transient nature of the IPS student population.

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[4] Information provided by IPS

Not as clear are the costs associated with open seats at active schools and the holding costs associated with buildings that have been closed. In order to fully understand the potential cost savings of filling or eliminating these empty seats, the holding costs must be quantified, which is a problem and opportunity faced by urban school districts across the country. To provide rough context, a 2008 report in Colorado estimated the cost of empty seats in Denver Public Schools at $600 - $700 annually, per seat. Utilizing this report alone as a reference point, one might broadly extrapolate that based on $650 per seat, this could amount to a cost savings of nearly $16 million annually to IPS in 2008 dollars.[5]

REALIGNMENT OF THE DISTRICT

For the successful realignment of the district, several data points need to be analyzed as part of the recommended process for identifying and communicating impacts on IPS facilities and buildings when considering program, grade distribution and/or facility changes within IPS. The many factors that should be considered as part of the recommended cross-functional assessment include:

- Cost of operations

- Impact to neighborhood

- Demographics of the neighborhood, i.e. poverty, crime, income & home ownership/rental levels, etc.

- Long-term demographic trends of the neighborhood

- Bond debt related to the facility

- Historical relevance

- Long-term viability of the building

- Leadership and teacher performance

- Student performance trends

- Feeder patterns, i.e. the strength of the elementary/middle school(s) that feed into the high school(s)

Closing a school often leads to heightened emotions of anxiety, fear and anger. The community sees what is being taken away instead of the new opportunities that can emerge for better quality educational options. Because schools are so important to the framework of a neighborhood, however, other factors are important for the district's successful realignment. These include:

- Neighborhood in which the school resides

- Existence of quality retail/food, parks/recreation and housing options

- Neighborhood's ability to facilitate transformative and sustainable change

- Strength of the neighborhood-based community development organization

- Nearby anchor institutions

- Existence of a neighborhood redevelopment plan

- Current or planned economic development or redevelopment initiatives

OPPORTUNITIES FOR CONSOLIDATION

When making the decision to right-size the district, a priority should be the creation of high-performing seats, as defined by the IFF as a seat within a school that received an "A" or "B" rating on the state's accountability system. Opportunities for consolidation should consider ways to fill these seats with students from nearby D and F rated schools. If enough A and B schools are not available, IPS should consider which charter schools are nearby and how partnerships could be developed to deliver high-quality education to all children.

[5] Lake, Robin J. and Betheny Gross, Eds. "Hopes, Fears, & Reality A Balanced Look at American Charter Schools in 2011." Center on Reinventing Public Education, University of Washington Bothell, January 2012. http://www.crpe.org/sites/default/files/pub_ch5_hfr11_jan11.pdf

Decisions related to consolidation should not be considered only at a point in time, but rather should factor recent trends and projections of population and households with school-age children. School performance should be considered in conjunction with the long-term projections for population change and growth, in coordination with the City of Indianapolis' comprehensive plan and the Department of Metropolitan Development, Plan 2020.[6]

The following analyses were prepared by The Polis Center at IUPUI, based on IPS data on school performance and population projections from the Indianapolis Metropolitan Planning Organization.[7] The first map shows the location of 22 IPS schools rated A, B or C by grade and whether they are a boundary or magnet school. The map also shows projected population change for Marion County from 2015 to 2025.[8] Generally, population is projected to grow in suburban areas of Marion County and surrounding counties at a faster rate than urban areas of Marion County, which comprise most of the IPS district.
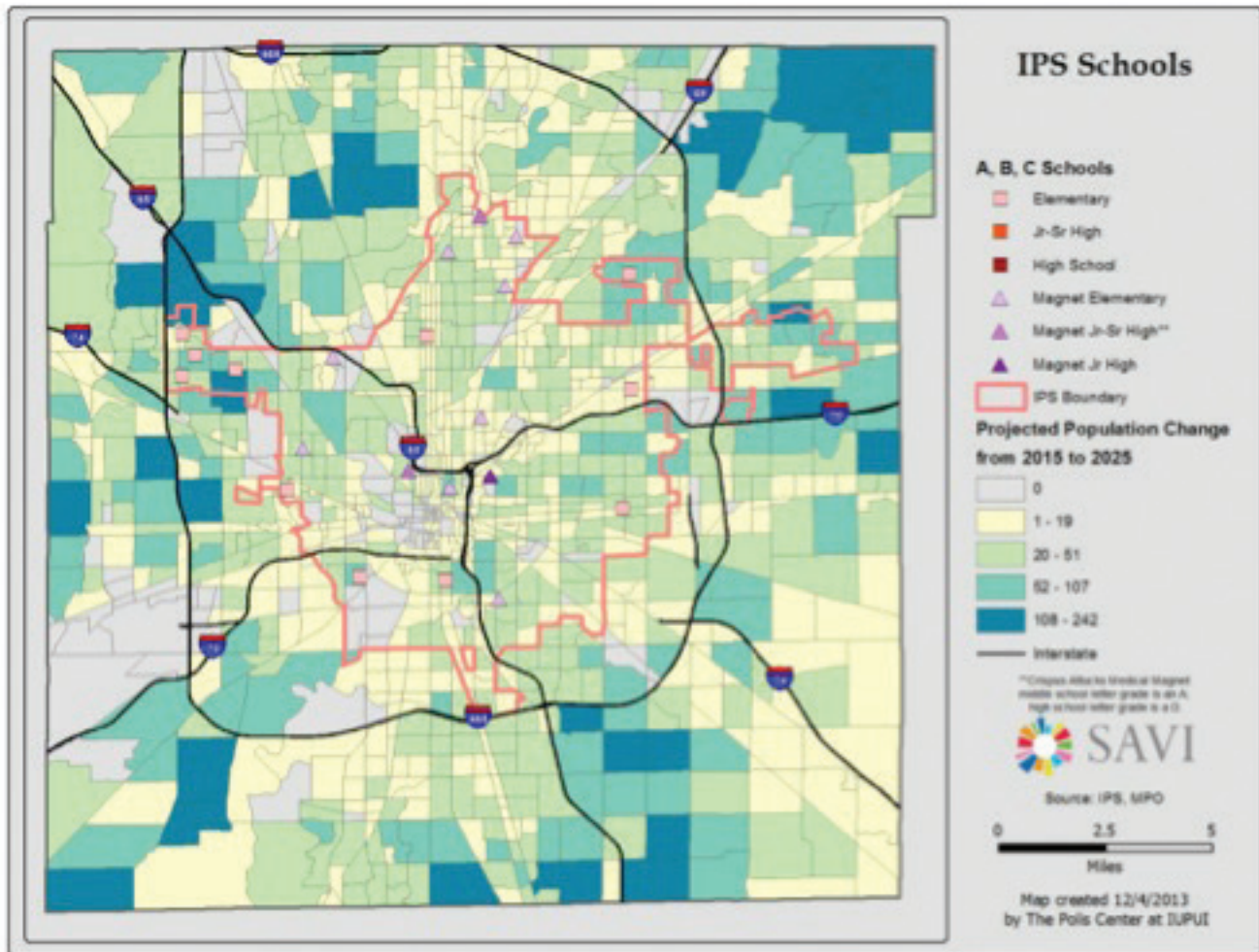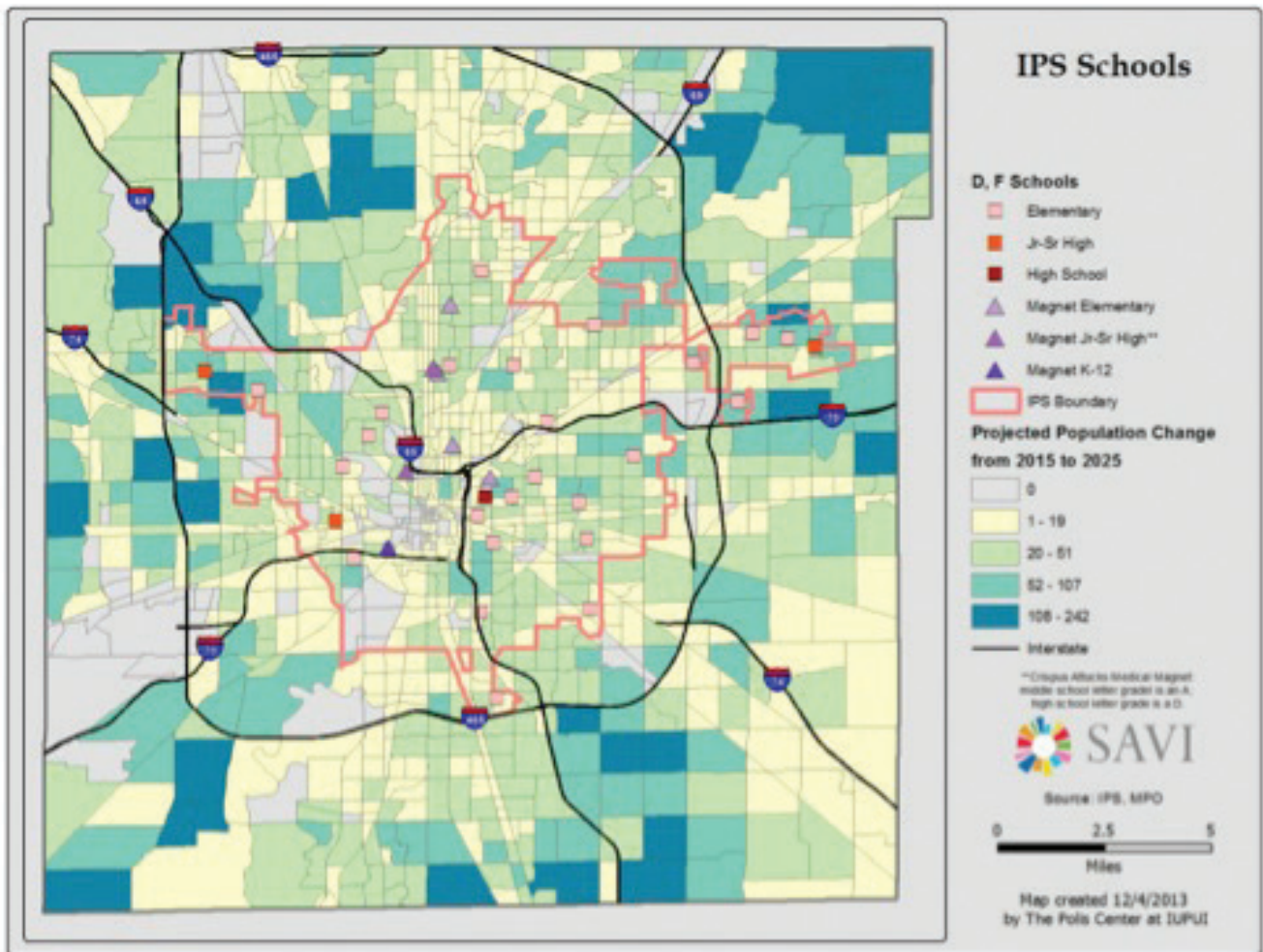

The second map shows the location of 32 IPS schools within the district rated D and F by grade and whether they are a boundary or magnet school. Again, the map shows projected population change for Marion County from 2015 to 2025.

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[6] For example, Indianapolis Downtown, Inc. recently published Velocity, the five-year strategic plan for downtown, and included a recommendation to "investigate the feasibility of an additional public K-8 school to entice more families to move downtown."

[7] This analysis is based on available population data; the MPO doesn't have projections by age or household formation, which would allow projections of school-age children.

[8] The MPO uses a growth-factor projection which applies the growth rate of each county to all geographies located inside the county. Since all counties in the metro area have a positive projected growth rate through 2025, there are no areas of negative growth shown. Of course, this may or may not prove to be true, given Center Township experienced a population decline of 194,000 while Marion County gained 352,000 from 1950 to 2010, as an example.

IPS Schools

D, F Schools
- Elementary
- Jr-Sr High
- High School
- Magnet Elementary
- Magnet Jr-Sr High**
- Magnet K-12
- IPS Boundary

Projected Population Change
from 2015 to 2025
- 0
- 1 - 19
- 20 - 51
- 52 - 107
- 108 - 242
- Interstate

**Crispus Attucks Medical Magnet middle school letter grade is an A, high school letter grade is a D.

SAVI
Source: IPS, MPO

0   2.5   5
Miles

Map created 12/4/2013
by The Polis Center at IUPUI

In Appendix A of this report, a chart is included that shows 54 IPS schools categorized by grade rating. For example, there are approximately 2,244 available high-performing seats in the A and B rated K-8 schools on this list (excluding high schools). The chart also shows each school's relationship to its respective neighborhoods, anchor institutions and any current or planned economic development or redevelopment investments. An expanded chart should show data on housing stock, parks and recreation, nearby food and retail establishments, and crime statistics. Note that the intent of this report is to also highlight certain conditions that exist in connection with these schools and to offer possible suggestions for change or improvement. This report excludes support services, alternative schools, storage/warehouse facilities and swing schools.

As noted earlier in this report, much of this data surpasses the original scope of this Task Force and should be gathered under the auspices of a new project scope by paid professionals. It is recommended that the new Task Force include members from the City of Indianapolis Department of Metropolitan Development, Department of Parks and Recreation, the Mayor's Office of Education Innovation, and The Polis Center at IUPUI to name a few, as they will also be valuable resources.

ENERGY AND RESOURCE EFFICIENCY

For K-12 schools, energy is usually the second largest operating expenditure, behind personnel costs. According to the U.S. Department of Energy, an energy-efficient school corporation with 4,000 students potentially could save as much as $160,000 a year in energy costs. IPS has an enrollment of 30,390 students and, therefore, the potential for energy savings could be significant.

ENERGY ASSESSMENT

IPS has 82 buildings, that vary widely in size (total square footage) and age. The cost of energy per square foot for each building also varies, which could be due to the size of the building, the type and age of the building infrastructure (HVAC, controls, insulation, etc.), the number of hours the building is in service per day, how the building is used, the type of building and many other factors that must all be taken into consideration. As a benchmark, IPS has the sixth highest utility usage per square foot among 44 peer school districts and the eighth highest water usage per square foot among 37 peer school districts around the country.[9]

Typical current average Indiana utility rates are $.08 per kWh for electricity and $.60 a therm for natural gas. Using these rates, Commercial Building Energy Consumption (CBEC) benchmarking for education indicates that the average utility cost for an energy efficient K-12 facility is $0.96 per square foot. According to the IPS Facilities Department, costs per square foot for buildings in the school corporation range from a low of $0.36 to a high of $3.76. Of the 82 buildings in the school corporation, more than half of the IPS buildings (academic and non-academic) have a cost greater than $1 per square foot. This does not imply that all of these buildings are running inefficiently, since there may be legitimate reasons for these particular buildings having utility costs higher than a typical facility. However, in an effort to close the gap on a potential budget deficit, these facilities should be investigated for potential savings opportunities.

Based on data provided by IPS, the following observations have been made regarding energy cost per square foot for IPS facilities

- Many of the older facilities in the district, 10 years or older, have higher utility costs and are in need of HVAC and other energy related upgrades to make them more efficient.

- Some of the non-academic facilities in the school corporation appear to have a high utility costs as well. The assumption would be that the costs for these facilities are due in large part to their original intended purpose, how they are utilized and the type of service they provide.

- Data also shows that some of the academic facilities that were constructed in the last seven to 10 years also have high utility costs. These facilities may simply need to be re-commissioned. With more investigation, these facilities could potentially become more efficient without sacrificing student achievement and staff comfort.

It is recommended that IPS plan to assess buildings in the district, academic and non-academic, with a focus on those that cost the school corporation the most money to operate per square foot. An energy audit of facilities will determine needed upgrades and potential energy conservation measures and a strategy should be developed to address how IPS can reduce its costs through both facilities improvements and instructions to staff on how to operate the buildings efficiently.

FINANCING ENERGY AND RESOURCE EFFICIENCY

If potential facilities improvements to reduce operating costs are identified, IPS will need to fund the capital investment amidst a growing budget deficit and shrinking capital projects funding. Finding the capital for an energy-savings project can be challenging, but school corporations have options in which to obtain financing, such as:

- Grants

- Capital Projects Fund

- General Obligation Bonds

- Qualified Energy Conservation Bonds (QECB)

- Qualified Zone Academy Bonds (QZAB)

- Lease Financing

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[9] "Managing for Results in America's Great City Schools: A Report of the Performance Measurement and Benchmarking Project." Council of the Great City Schools , October 2012.

Utility incentives and rebates can help to reduce the cost of an energy-savings project, although the amount of the incentives depends on the type of energy conservation measure.

Other school districts that have sought to improve their facilities have turned to an Energy Services Company (ESCO) or Qualified Provider to help identify and evaluate energy-saving opportunities and then recommend improvements to be repaid through operational savings. This strategy is known as a guaranteed energy savings contract.

Private businesses, as well as K-12 schools, colleges and universities and government agencies (federal, state and local) in Indiana and throughout the United States use guaranteed energy-savings contracts as a means in which to make facilities upgrades and reduce energy and operational costs. The State of Indiana provides a legislative means for public buildings, higher education and K-12 school corporations to improve their facilities and use the savings to help repay the cost of the project. The Indiana Office of Energy Development (OED) provides a booklet that includes the Guaranteed Energy Savings Contract legislation and provides guidelines of "best practices" that school corporations in Indiana can use in order to select a Qualified Provider or Energy Services Company. OED also provides a list of providers that must be registered with the State of Indiana.

The primary advantage of these agreements is that the school corporation can participate in the project without a large upfront investment of capital. The Qualified Provider will guarantee that savings meet or exceed annual payments to cover all project costs. Over the contract term, savings are used to pay for the project over a period not to exceed the lesser of 20 years or the payback period of the project. If the guaranteed savings are not met, the Qualified Provider bears the risk and must pay the difference between the guaranteed and cost savings. Once the contract ends, all additional cost savings accrue to the school corporation. To ensure savings, the Qualified Provider offers staff training and long-term maintenance services.

A Qualified Provider can help IPS:

- Identify and evaluate energy-savings opportunities
- Develop engineering and design specifications
- Manage the project from design to installation to monitoring
- Arrange for financing
- Train the school corporation's staff and provide on-going maintenance services
- Provide a savings guarantee

Energy-related improvements such as lighting technologies, boilers and chillers, energy management controls, water conservation and much more can be procured through a Guaranteed Energy Savings Contract. The benefits of energy efficient improvements include:

- Lower energy costs
- Modern building infrastructure and reduced maintenance costs
- Improved comfort, health and safety
- Environmental compliance

The benefits of a comprehensive energy-savings project are often better than procuring single energy conservation measures year after year. By expediting the scope of work, IPS would realize immediate savings and quickly improve the learning environment in its schools and take a proactive, rather than reactive, approach toward capital and infrastructure improvements. The goal is to combine short payback improvements that help to offset long payback measures. If all energy conservation measures could not be performed at once, then phasing projects would be a potential alternative. Measuring and verifying savings is also an important aspect of Guaranteed Energy Saving Projects. Qualified Providers can provide measurement and verification of projects to track how well the actual savings match the expected performance.

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[10] IC 36-1-12.5 - Guaranteed Energy Savings Contracts. The State of Indiana's Office of Energy Development (OED) has specific information about the Guaranteed Energy Savings Contracts legislation and best practices of selecting a Qualified Provider. OED can be found on the Web at (energy.IN.gov).

PROCESS TOOL AND RECOMMENDATION

The decision-making process employed by IPS, as related to, for example, educational model selection, building reconfiguration plans, etc., has historically not taken into consideration the associated impact on IPS facilities and buildings. The primary mode of operation has been to decide upon a proposed change and thereafter communicate the decision to the facilities and buildings function, who must then respond by implementing the change. Decisions are sometimes made based on invalid data or anecdotal statements. Data is not always verified before decisions are made, and sources have not been identified. This approach to decision making has become increasingly more difficult to accommodate considering the current and future financial constraints that the IPS School District must operate within.

Because of this, the committee worked to develop a decision-making tool for identifying and communicating impacts on IPS facilities and buildings when considering program, grade distribution and/or facility changes within IPS. The types of changes considered in scope for the decision making process include, but are not limited to:

- Changes to existing or creation of new educational models or programs

- Redistricting

- Creation of new buildings

- Disposition or repurposing of existing buildings

Concluding the efforts was the execution of a "pilot," culminating in a cross-functional review of pilot results and an assessment of the process. This pilot was used to make the recommendations found in this section of the report. Additional detail is available in Appendix B.

CONTRACT SERVICES

This area of evaluation included Indianapolis Public Schools materials, supplies and contracted services assigned to the general fund account. It did not include materials and supplies assigned to non-general fund accounts. Operational definitions of supplies and services are as follows:

Materials & Supplies:

Decision making, business processes, and actions resulting in entries within the "materials & supplies" category of the operating budget. Scope includes instructional supplies, custodial supplies, and student/office supplies. Examples of supplies include standard cartridges, slides, crayons, cleaning materials, workbooks, text-books, ice melt, etc. Additional examples include paint, lumber, natural gas, fuel, audiovisual, tires, printers, security radios, soap.

Contract/Purchased Services:

Decision making, business processes, and actions resulting in entries within the "purchased services" category of the operating budget. Categories: Professional Services (Examples: engineering, architectural, legal services, software support); On-Calls (Examples: lawn cutting, electrical repairs, drain clearance, carpentry, pest control, fire alarm service, elevator maintenance and repair, transportation services, transportation maintenance); Student Services (Examples: occupational therapy, speech therapy, psychology, educational mentoring, mental health services) and Instructional Services (Examples: school turnaround services, community resources, student discipline services).

For the purposes of this report, the following assumptions are made:

- Benchmarking in and out of state on key metrics (e.g. insurance rates, contract service rates)

- Competitive negotiating strategies and bidding process for contract services, materials, supplies and insurance rates below $10,000

- NOTE: Indiana law does not require bidding for professional services. As a result, IPS does not formally bid for professional services

This report recognizes that there are certain constraints to be considered in contract service evaluation:

- Decisions impacting materials, supplies and contract services that do not include stakeholders

- State and federal regulations

- Indiana Department of Education, State Board of Education and legislative mandates

- Instructional leaders and administrative directors who may not have been prepared to manage business/financial aspects of their respective roles

- Transfer of money across cost centers to support materials, services, and/or supplies not funded by the current year's budget

The IPS Purchasing Department manages contracts for contracted services for schools and administrative departments. School staff and departmental administrators are responsible for identifying their school, student and departmental needs. School principals and departmental directors are responsible for approving the service requests, and IPS Purchasing is responsible for processing service requests. A process map for more objective and accountable decision-making appears below. Committee recommendations are primarily targeted toward strategies and decision-making outside of the IPS purchasing department scope.

IMPACT ASSESSMENT PROCESS MAP
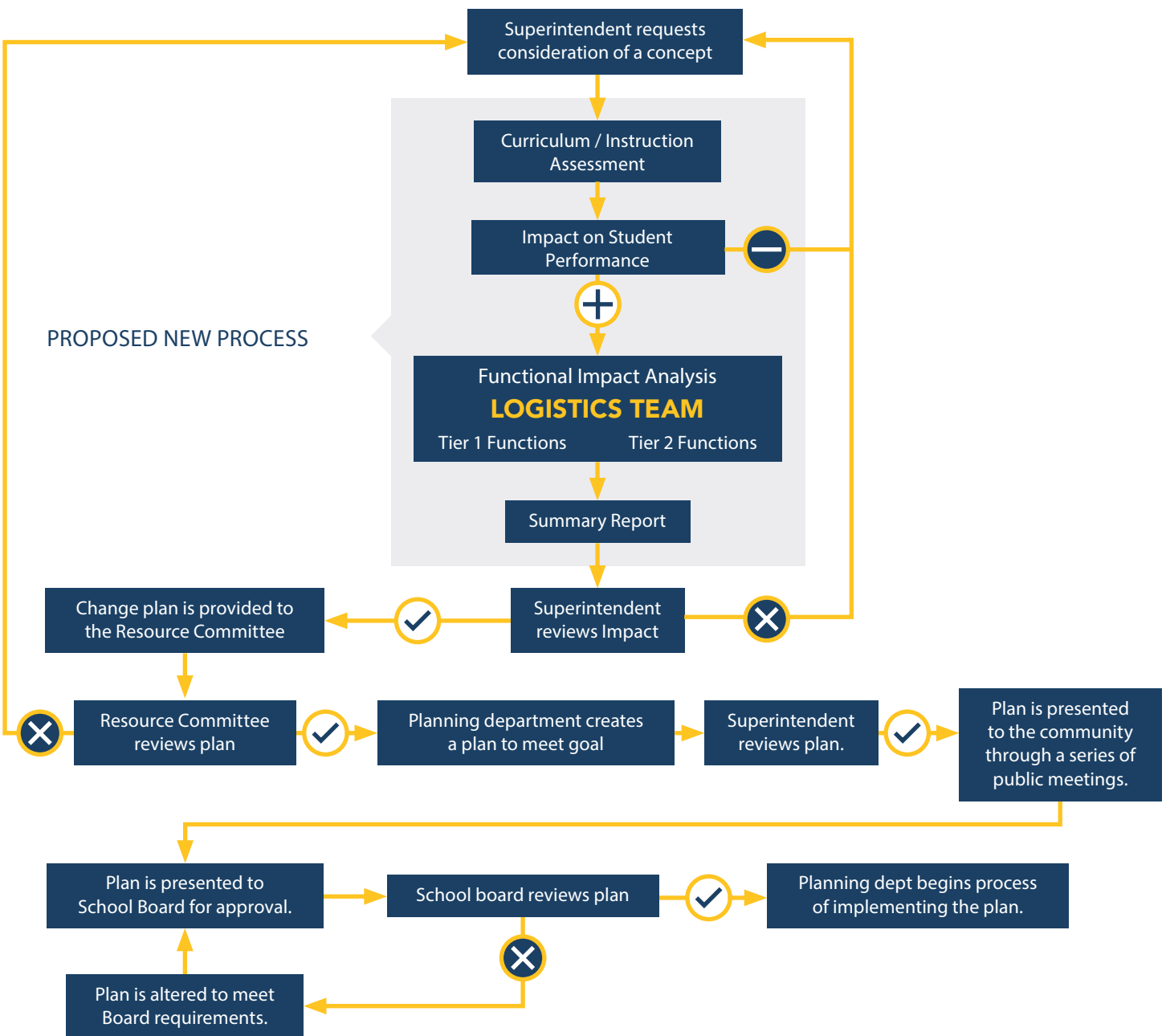
CONTRACT SERVICES RECOMMENDATIONS

Cost-conscious business strategies and decision making prior to contracting services or purchasing materials/supplies can help reduce the anticipated budget shortfall in 2014. In addition, IT systems that allow an integrated and big-picture view of contract services and purchasing patterns can help IPS employees adjust contracting and purchasing strategies to reduce cost. Lastly, periodic benchmarking against successful, urban school districts across the country can help IPS leaders make contracting and purchasing decisions, which can also reduce cost.

The recommendations fall into two categories: limiting expenditures based on available revenue and leveraging expertise within the district and the community.

Limit Expenditures Based on Available Revenue

- Develop contract service budgets that do not exceed revenue.
- Implement approval requirements for various levels of contract service expenditures.
- Require CFO (or budget office personnel) prior-approval for formal contracts.
- Require CFO (or budget office personnel) prior-approval of all positions and new hires.
- Require CFO (or budget office personnel) prior-approval for designated services contracts.
- Track "designated service" contracts across cost centers. Identify opportunities for meaningful reductions based on assessment.
- Identify non-budgeted, non-CFO approved positions created over the past two years and develop a 2014 staffing plan specifically for these positions.
- Reduce the number of properties for which IPS is responsible, which will reduce the property insurance premium. The current property total insured value (TIV) represents 24% of the $2.4 million insurance premium for 2014.

Leverage expertise within the district and the community

- Identify opportunities for significant (e.g. 50% or more) reductions to the contract service budget allocated to management cost centers. Offset reductions by leveraging the skills and expertise (e.g. process improvement, leadership development, best practices, community school strategies) of local business partners, successful leaders within the district, and local universities.
- Adopt cost-effective options that leverage expertise within the district to mentor low-performing schools. Example: Incentivize high-performing schools to mentor low-performing schools by giving them a bonus of $75,000/year, instead of contracting a "lead partner" at a charge of $3,395,948 against the General Fund (2012 – 2013).

Note: Effective June 2013, contract lead partner services are being provided under a contract in the amount of $520,000, which is divided between School Improvement Funds ($505,000) and Title IIA ($15,000) – both federal-based funds. Currently, no lead partner costs are assigned to the General Fund.

Implement Strategic Planning for Contract Services

- Implement a spreadsheet (short-term) or an integrated IT system (long-term) to evaluate contractors by category in order to identify potential cost efficiencies.

WAREHOUSING

Warehousing benefits are classified as economic and service. Ideally, a warehouse provides both benefits. Economic benefits are those benefits realized by reduction in overall logistical costs. Service return-on-investments are typically difficult to quantify because they are hard to measure (Bowersox, Closs, Cooper, & Bowersox, 2013).

The IPS warehouse provides economic benefits in that both consolidation and break-bulk activities take place, as well as product mixing and reverse logistics. In 2013, a comparison of IPS Purchasing history to Business Purchasing Solutions (BPS) negotiated prices for the same supplies revealed $407,301 in IPS savings. BPS is a complete procure-to-pay system that was designed by the state to deliver savings to schools and companies. (BPS consultants offer software, system procurement expertise, vendor negotiations and vendor management.)

IPS buyers competitively quote items on a daily basis, as requisitions for items that are not on contract and smaller purchases are received. When IPS buyers see an opportunity for savings, they regularly contact competing vendors for competitive pricing. Buyers have been directed to competitively procure all non-contract supplies, materials, and equipment items that exceed $10,000.

By providing full-line stocking, the IPS warehouse serves to reduce the number of suppliers the customers (schools) interact with. This makes economical larger shipments possible. This is classified as a service benefit (Bowersox, Closs, Cooper, & Bowersox, 2013).

While these benefits are similar to the benefits of many warehouses, the factors that make the IPS warehouse unique pertain to its cost structure. In traditional warehousing, there are various factors such as lease payments (or mortgage payments), depreciation, property taxes, as well as the cost of capital invested in a logistical asset. With the building housing the IPS warehouse being donated, none of these factors applies.

If potential alternatives to IPS warehouse operations (i.e. direct ordering or outsourcing) are considered, those alternatives must include a cost-to-benefit assessment. Such an assessment must include the current costs of the warehouse utilities and warehouse personnel salaries.

In 2013 warehouse operating costs were:

Operating Cost Description	2013 General Fund Cost
Total compensation/benefit for 8 FTEs	$524,267
Total Annual Utilities	$6,858
Other Operating Costs	$19,511
Total Warehouse Cost	$550,635

WAREHOUSING RECOMMENDATIONS

Warehousing recommendations are as follows:

• To operate at highest efficiency, the warehouse operation should be relocated to an actual warehouse. Current facility is approximately 100,000 square feet. IPS warehouse staff indicated the facility could operate within a proper warehouse of 60,000 square feet. There are certain conditions which need to be met for this recommendation to work:

   o The warehouse space must be rent-free and tax-free. Currently, IPS is only paying utility costs.

   o At least three dock doors are preferable.

   o Must be centrally located to the IPS buildings (i.e., close to downtown area).

• Regularly track performance metrics (i.e. inventory turns) to set purchasing strategies for the following year, to auction unused materials/supplies, and to counsel customers on more cost-effective options. Inventory management (at schools and warehouse) should be continuously improved to cut costs. Consider replenishment pull systems to manage inventory and stock outs of key supplies.

• Require school personnel to go through discontinued books to remove any extra materials (overhead transparencies, etc.). This would be more efficiently done at the school level as the books are collected.

• All supplies stocked in the warehouse should only be allowed to be purchased through the IPS warehouse to reduce ordering costs and unit costs.

• Consider implementing the following:

   o Add metrics for performance, redundancy, compliance and risk across contractor categories

   o Add "stock turns" to warehouse metrics

   o Monitor and limit "designated services" contract expenses

   o Periodic customer satisfaction surveys

TRANSPORTATION

Transportation provides many opportunities for increased efficiencies and savings for the district. IPS currently has 302 buses in its fleet. A list of recommendations and projected dates for implementation follow:

• Implement pilot program to utilize IndyGo buses for Magnet students needing extracurricular transportation.

    o Target Implementation: Q1/2014

    o IndyGo and IPS can negotiate a bus fare pass program that will provide IPS Magnet students with a valid IndyGo bus pass to utilize the current IndyGo bus system without restrictions (to and from school, after-school programs, transportation to work, recreation, etc.) IndyGo staff offered to conduct orientation/training sessions with students, faculty, staff and parents on how to plan and utilize the IndyGo transit system.

• Implement technology update to allow GPS location of buses.

    o Target Implementation: Q1/2014

• Explore potential maintenance partnerships with City of Indianapolis and IndyGo.

    o Target Implementation: 08/2014

    o Although IndyGo has strict federal guidelines relating to the utilization of facilities, equipment and manpower for public or private school bus services, IndyGo offered to continue to support discussion and planning initiatives in an advisory role leading to improved efficiencies, training, facility and equipment layout and use as well as opportunities for coordinating operations with the city and other school systems or contracting.

• Partner with IndyGo for route evaluation study.

    o Target Implementation: Q1/2014

    o IndyGo, in coordination with the Indianapolis Metropolitan Planning Organization (MPO), would make available federal planning funds, with IndyGo providing the required 20% local match, to conduct a transportation study, similar to the 2008 IPS Transportation Study conducted by IndyGo and consultant partners. The scope of the study would evaluate IndyGo and IPS routes to identify opportunities for public transportation services to support IPS transportation requirements as well as financial modeling for potential cost savings and fare structure.

    o The IPS Transportation Study referenced here would evaluate this recommendation for feasibility of this recommendation. However, the opportunity exists presently for IPS students to utilize IndyGo transit service as an alternative to school bus service. An agreement could be created which details when and how a student would use IndyGo service, provide direction on walk policy and establish a negotiated fare structure.

• Move most extra-curricular students to IndyGo transportation.

    o Target Implementation: Q1/2014

    o By federal regulations, IndyGo is prohibited from providing "charter" or contracted services, but IndyGo has offered to continue discussion to determine opportunities to utilize the current IndyGo transit systems to support access to IPS extra-curricular activities.

• Move deadhead routes and homeless to IndyGo where possible.

    o Target Implementation: 8/2014

• Implement true 3 Tier Bell System

    o Target Implementation: 8/2015

    o Move elementary students to early bell and high school to late bell.

    o The IPS Transportation Study would identify service coordination with recommendations for changes to bell times

• Potentially drop outside bus contractor.

    o Target Implementation: 8/2015

• Place students in grades 9-12 living outside of a school's home geographic area onto IndyGo service and fully implement blended routes between IPS and IndyGo.

    o Target Implementation: 8/2015

See Appendix C for state statute governing school transportation.

HUMAN RESOURCES

Employee salaries and benefits total approximately 90 percent of the IPS General Fund budget. Therefore, effective human resource management policies and practices are critical to the success and efficient cost structure of IPS. In that regard, the HR Committee was charged with developing high level priorities, recommendations and considerations, including examples where appropriate. Prior to discussing these recommendations, it is important to note certain data points. These points are particularly salient given the high percentage of the IPS General Fund that is accounted for through personnel. Specifically, the below benchmarking data was considered, and further study and additional benchmarking is recommended. While other areas of consideration are important, and staffing must continue to take into account the specific needs of IPS students and the complexity of the student population, it is notable that by managing staffing levels to the averages below, it is conceivable that IPS could make up a significant portion of its budget shortfall.[13]

District/ Location	Year	Students	Teachers	Admin.	Staff	Support Staff	HR Staff	Outsourced (in EE count)
Indianapolis Public Schools	2012/13	29,938	2,430	171	1,999	in Staff count	24	None
Lawrence Township		16,000	906	50	1,628	in Staff count	6	Substitute Teachers
Perry Township		14,687	879	62	905	in Staff count	4	None
Pike Township		11,186	662	80	550	in Staff count	5	Food Service/ Custodial
Archdiocese of Indianapolis.	2012/13	21,333	1905*	142	unavailable	unavailable	unavailable	Varies
Ft. Wayne, Indiana	2012/13	30,992	1,867	unavailable	unavailable	unavailable	unavailable	unavailable
Durham, North Carolina	2012/13	33,086	2,300	unavailable	unavailable	unavailable	unavailable	unavailable

District/ Location	Student/ Teacher Ratio	Student/ Staff Ratio	Student/ Staff Ratio	Student/ HR Staff Ratio	Student/Total Employees Ratio
Indianapolis Public Schools	12.3	175.1	15.0	1,247.4	6.5
Lawrence Township	17.7	320.0	9.8	2,666.7	6.2
Perry Township	16.7	236.9	16.2	3,671.8	7.9
Pike Township	16.9	139.8	20.3	2,237.2	7.9
Archdiocese of Indianapolis.	11.2	unavailable	unavailable	unavailable	unavailable
Ft. Wayne, Indiana	16.6	unavailable	unavailable	unavailable	7.6
Durham, North Carolina	14.4	unavailable	unavailable	unavailable	7.2
Average	15.1	217.9	15.3	2,455.8	7.2

[13] The above information was provided upon request from the respective school districts.

Grade Level	Students	Teacher
Kindergarten	22	1
Grade 1	23	1
Grade 2-3	24	1
Grade 4-6	28	1
Grade 7-8	32	1
Grade 9-12	32	1

The above data is included primarily to underscore the key point of this human resources report. Like business, IPS should benchmark staff levels against peer school districts to periodically test its staffing levels. Where significant deviations from benchmark data is experienced, further analysis of why these deviations exist should follow. For example, given the significant population of IPS students with special needs, any deviations from benchmark data might be driven (in part) by unique IPS demands in the area. Substantial deviations might also require study and analysis of factors such as:

• Comparative layers of management and supervision, both in central administrative offices, support functions, and within schools themselves.

• Spans of control of each supervisory role to create a flatter, more accountable organizational structure.

• Functions contracted to third parties.

Each of the above should be considered and, where no significantly unique factors within IPS drive deviation from benchmark data, action to better conform to benchmark data should be taken, likely enabling significant cost savings.

Simultaneously with, and following any such benchmarking exercises, it is important to build a culture in which state-of-the-art human resource processes and practices are applied to ensure both quality and efficiency are realized in managing personnel. In that regard, the Human Resources Committee has developed the following recommendations comprised of both immediate and ongoing priorities. Each priority includes recommendations and considerations based upon research, IPS staff input and the experience of the committee members.

Immediate priorities include:

• Host small focus group discussions with IPS employees.

• Implement a more rigorous human resource "headcount management" planning process.

• Improve the recruiting process for all positions.

• Improve the performance management process.

Ongoing priorities include:

• Identify strategies to improve culture and morale.

• Provide talent management/succession planning.

• Review benefit packages.

• Ensure the progressive discipline policy is understood by all employees.

From an IPS financial standpoint, the most critical of the recommended priorities is developing a framework for headcount management. The review of all levels of management, the current spans of authority, development of a working organization chart and opportunities for the outsourcing of services should be parts of this framework. With

employee salaries and benefits totaling approximately 90 percent of the entire IPS General Fund budget, benchmarking with other local and national school systems should begin immediately. The above benchmarking report provides an example of the public information that is available to assist in the development of this framework.

This group did not develop detailed "how to" plans or directives to the IPS staff. Rather, the recommendations reflect a proven track record of success throughout the business careers of the committee members and will prove successful when implemented by IPS. The committee would welcome the opportunity to continue our involvement in the improvement process by developing the recommendations in much greater detail.

IMMEDIATE PRIORITIES

RANDOM SURVEY OF EMPLOYEES AND FOCUS GROUP DISCUSSIONS

It is recommended that a random survey of all employees be conducted after which the Human Resources management team would host small "focused groups" discussions in order to identify strengths and areas for improvement.

The Human Resources management team should conduct a random survey of all IPS employees. This anonymous survey would allow IPS to identify "themes" and show strengths and areas of improvement. Conducting this survey demonstrates the Human Resources leaders are interested in getting live feedback and have a desire to change, thus improving culture and morale. Once the "themes" are identified, focus group discussions should be conducted. These discussions will provide IPS leadership with constructive feedback from its most valuable resources, the teachers, staff and administrators.

This also allows HR management to meet broadly with an important group of key stakeholders and engage them on how to improve customer service to the schools. The feedback gathered from the small focus groups will lead to new outcomes and new ideas. Facilitators should be chosen to assist in these focus groups and given a list of the themes to elicit specific feedback from the participants. Post-engagement discussions and surveys should follow the initial meetings.

Headcount Management

It is recommended that IPS implement a more rigorous human resource "headcount management" planning process to increase parity and improve efficiencies in the district.

Currently, there is no organization chart for the entire IPS system; the first step in "headcount management" is to identify who works where within the organization. Once the IPS organization chart is created, a comparison can be made of the current headcount as to the previous years. The current headcount should not look the same and will need to be adjusted taking into account today's enrollment numbers as compared to the enrollment numbers of the past. The next step will be benchmarking the current headcount and structure with surrounding school systems, private schools and comparable school systems across the nation.

As the organizational structure is identified, the question must be asked, "Are the principals given the resources they need in their schools?" Perhaps transferring some of the decision-making process to individual school administrators and training those leaders on the business side of the process would allow for greater performance, yet decreased headcount. Additional considerations would be pooling resources between schools, outsourcing (maintenance and substitute teachers) as well as in-sourcing (legal). Levels of management will need to be considered. In many organizations, when looking to increase efficiencies, flattening the organization has facilitated in making the organization more efficient.

Other areas that impact headcount are technology. A solid and well integrated IT system could automate human resources information and some other functions within human resources and possibly decrease head count.

Improve the recruiting process for all positions to attract and retain qualified applicants

Improving upon the recruiting process requires IPS to first identify the needs of the district as well as each individual school. In order to determine the needs of the district, IPS will need to take into account the following:

- What are the future skill sets needed for IPS employees?

- What are the necessary qualifications of the teachers?

- Are there any commonalities with regard to criteria and job descriptions?

- What is the culture of the individual school? Of the school district?

Once the needs of the schools and the district are identified, answering how/what/when and where to recruit, will be imperative. Benchmarking against the Council of the Great City Schools and partnering with other educator provider organizations such as Teach for America, Woodrow Wilson, etc. will assist IPS in creating a high-caliber talent pipeline.

In implementing this new process, involving principals in the hiring process for their schools would be beneficial. The principals could be trained to understand the hiring process and their role in interviewing and hiring. Once the training was completed, having multiple school leaders interview candidates along with a human resources representative would streamline the process and make it more efficient.

Improve the performance management process

Improving the performance management process would allow employees to know what is expected of them and allow them to be recognized for attainment of their goals. The IPS leadership must set the tone for employment and expectations of achievement. A formal and consistent review and evaluation process needs to be established and this system should mirror a set of core principles and standards that are developed and adopted throughout the district.

Once the evaluation process is established, ALL employees need to be informed of what is expected of them by their team leaders and reinforced by the district and Human Resources team (perhaps instituting a structured mentoring program could facilitate in communicating expectations and accountability). Human Resources must ensure that formal reviews are scheduled and completed throughout the system. In so doing, it will also need to be determined who will conduct the performance reviews, the metrics and performance ratings. Whoever does the reviews must be properly trained in coaching, feedback, writing of performance reviews, etc. and reviewers must be advised of the steps to be taken to ensure that performance improves.

Last, it is vitally important to create a work environment with high morale. Measures such as recognition and incentives should be provided to staff and teachers on a consistent basis. This will encourage excellence and high performance.

ONGOING PRIORITIES

Identify strategies to improve culture and morale

Going forward, identifying strategies to improve culture and morale will ensure the sustainability and success of IPS and its employees. The first step will be to identify the current culture of IPS and the desired culture via the focus group discussions. As part of this strategic process, perhaps having an off-site senior management team retreat would facilitate in identifying the desired culture. Consideration should be given to include school board members in the same or a different retreat, as it will be important to have the senior staff and school board on the same page both internally and externally in order to provide the best quality education for the students. Allowing for peer interaction, a roundtable of sorts, creating reward and recognition programs and encouraging initiative are all tools that can be used to develop culture and foster an improved morale.

Create talent management/succession planning to identify and develop top performers

Having a talent management and succession plan is an excellent and important legacy of the IPS superintendent. It ensures that once a successful strategy, plan and culture are created and nurtured, success will continue to foster and grow and have lasting impact on the students, staff and community. As a part of the talent management component, developing a template and system to highlight future leaders or high performers is imperative. Peers "rise to the occasion" and strive to meet expectations, by having solid performance measures. Completing the annual reviews and rewarding achievement will create a tide that inevitably continues to elevate the whole of IPS and its team.

In addition, human resources leaders may want to create a development plan for high performers and place employees in positions where they will learn and grow. The additional development of the employees will enhance and enrich the positive morale and culture of the district.

Review benefit packages to remain competitive and look for efficiencies

A good benefits package is important to retaining talent; thus it is vitally important to be consistent in pay and with benefits. In order to determine the best packages to offer, evaluation of the packages should be a part of the benchmarking process, and there should be a periodic review of the health insurance pools. IPS should be confident it is offering the best package possible for the size of its system.

Simultaneously, human resources should work with the IT department to automate the benefits process. This would be the first step to streamlining and becoming more efficient in human resources.

Ensure the progressive discipline policy is understood by all employees and being applied in a consistent manner

To set the foundation for a strong IPS with high morale and a thriving culture, a consistently applied progressive discipline policy should be implemented and understood by all employees.

A progressive discipline model must define actions, document behavior and allow discipline to be enforced. It must be a manageable process or no one will use it. In addition to a simple process, all employees must be educated on what is expected of them and a periodic review of the expectations and disciplinary process may be advisable. The implementation and creation of a progressive discipline policy and process should be benchmarked with other school systems.

FINANCE

The Finance Committee of our Task Force undertook a review of the financial operations of IPS. Our goal was to identify, address and propose strategies to make the financial operations of IPS more cost effective and efficient.

The Finance Committee recognized early on that there are financial implications in each of the areas being reviewed and worked to avoid duplication of the efforts of the other committees.

FINDINGS, OBSERVATIONS AND RECOMMENDATIONS:

First, we recognized approximately 90% of the General Fund expenditures are salaries and benefits, thus in order to hit the targeted cost reductions, managing headcount is vitally important. The recommendations made by our Human Resources Committee have taken this into consideration and included recommendations for benchmarking the headcount management process.

IPS should reconsider its participation with the Council of the Great City Schools. There is a wealth of opportunities to obtain and utilize benchmarking information through this organization.

FORECASTING, BUDGETING AND FINANCIAL REPORTING:

Historically, the IPS budget has been developed based on expenditures. These discussions must include revenues and expenses, a profit and loss approach. Revenue forecasting is done on a fiscal year basis and the budget is currently presented on a calendar year, which, according to information provided is a statutory requirement.

It is recommended that IPS adopt a by budget model that matches revenues and expenditures by type and by fund. The General Fund budget should show revenues of all types that will be used to support General Fund expenditures, and the same for the transportation and other funds. Implementing this recommendation will ensure proper matching of revenues and expenditures whether it be on a calendar or fiscal year.

FINANCIAL REPORTING TO THE BOARD OF SCHOOL COMMISSIONERS:

In addition to the above recommendations, a financial reporting model should be adopted that shows year-to-date comparison to budget.

GRANTS MANAGEMENT:

Many other urban school districts around the United States have staff coordination for all grant-making activities, including tracking historical and pending application activities for all state and federal programs; both formula and discretionary. Consideration should be given to the creation of a comprehensive grants management strategy as well as the organizational structure to implement. The plan would address the strategy and coordination of both public educational and philanthropic grant opportunities.

The comprehensive strategy should involve an ongoing needs assessment and prioritization process, the development and execution of a federal funding plan, and the dedication of sufficient resources to carry out these activities. The needs assessment process should identify IPS projects by content area, and then connect the projects to specific opportunities across the spectrum of public agencies and grant programs. It should be noted that not all federal funding opportunities will arise from education programs. For example, there may be federal historic preservation, technology, transportation, law enforcement and health programs that can support specific projects. This would require a facility-by-facility evaluation, and some programs may require an external partner, such as a local government or healthcare provider.

The identification effort can be conducted through a request-for-proposal approach with IPS personnel. For example, the central office could formulate a questionnaire for staff that solicits suggestions for supplemental funding. A review panel could evaluate these proposals and identify priorities based on criteria such as core areas of strength, multi-disciplinary characteristics, utilization of community-based partnerships, and the likelihood of attracting federal funding.

Once the potential projects are identified, there would be a corresponding implementation plan setting forth the necessary steps and allocation of effort to pursue these priorities. It is highly advisable to have this activity concentrated in one office to ensure there is coordination and that essential resources are available. Other independent, mission-

oriented projects could proceed, on a monitored basis, but the program support would be devoted to the identified priority projects.

Organizationally, IPS should carefully evaluate the cost-benefit of establishing in-house leadership and staff for this effort or contract out to a consulting and grants management firm. Comprehensive fund development programs of this nature are an aggressive activity who many elementary and secondary school systems have put into place. In some cases, there are teams of faculty that devote the majority of their time to grant identification and writing. The sponsored program offices within higher education institutions (e.g. Purdue, Indiana University, etc.) also offer a model to be adapted to the scale and other factors relevant to IPS. This course of action will provide a distinct, competitive advantage to obtain federal and other external resources.

OFFICE OF DEVELOPMENT

IPS should develop a formalized office of development integrating with the IPS Foundation to focus on major gifts, planned giving and alumni giving.

A working group should be formed to determine the interest from IPS and the community to create this office. If a development office is a viable option, this group should test the economic feasibility of creating this department within IPS or its foundation and explore the use of the higher education or private school fundraising model. Since IPS is a publicly funded entity, the school corporation should hire an education-based fundraising consulting firm to identify the target audience, depth of the market potential and the communications strategy. A strategy should also be developed to encourage that businesses gain ownership in the giving process. Development should be incorporated into the budget process and engaged with financial management.

Fundraising efforts should be broken down as follows:

- Individual gifts – operating budget (i.e. staff salaries, maintenance, etc.).
- Major gifts – major/significant capital projects (i.e. these gifts are likely to come from IPS graduates who want to give "above and beyond the status quo" for the school corporation).
- Planned gifts – many individuals over the age of 50 consider this giving program because he or she may start to think about mortality. Planned gifts help elderly people leave their mark or legacy. This revenue source also has potential among non-IPS graduates.
- Corporations and not-for-profits must experience a gain from its gift. For example, a major financial gift might provide new desks for 10 classrooms. In this context, the gift has a major impact as opposed to an annual fiscal donation that is not directed toward an immediate need or project.

ADOPT-A-SCHOOL INITIATIVE

An "Adopt-a-School" initiative allows corporations and/or foundations to engage with IPS to provide resources, including volunteers, tutoring and funding for IPS facilities. For example, a company could contribute volunteer time for student tutoring or mentoring as well as allocate funding for the renovation of a classroom. Over the years, this organization would be responsible for the upkeep of the classroom or school facility (such as painting needs, etc.). This initiative engages the business community, creates partnerships and provides schools with financial and other support to maintain a competitive learning environment. IPS should consider implementing the "Adopt a School" initiative and develop a process to identify potential organizations to support and participate in this initiative.

NAMING RIGHTS AND SPONSORSHIP OPPORTUNITIES

Although IPS does receive some sponsorship funds, naming rights and sponsorship opportunities could generate revenue for IPS. Under such an agreement, IPS would receive revenue in exchange for naming rights from businesses, foundations and individuals. For example, a business might dedicate $100,000 for renovations of the school auditorium. The school would then name the auditorium after the business to recognize its contribution to the renovation process.

Among the naming rights and sponsorship programs that could be evaluated are:

- Lower energy costs.

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[11] Sagamore Institute

- Sponsorship of school programs – Corporations subsidize school programs or one-time events in return for the right to associate their names with those activities, providing opportunities to create positive images for their brands.

- Exclusive agreements – Exclusive agreements between schools and corporations give corporations the exclusive right to sell and promote their goods or services in the school or district.

- Sponsorship of incentive programs – In return for faculty, staff, students, parents in specified activities, corporate-sponsored incentive programs offer various rewards to students, schools, or districts. Incentives can include money, goods or services.

- Appropriation of space on school property – In the appropriation of space agreements, schools receive money in exchange for allowing corporation to place their names, logos or advertising messages in school space such as on scoreboards, rooftops, bulletin boards, walls, textbooks or school buses.

- Sponsorship of supplementary educational materials – Corporations or trade associations provide schools with materials that may have value as instructional content.

- Fundraising – For decades, schools have formed partnerships with businesses to help with fundraising. Such programs include door-to-door sales and affinity marketing campaigns.

- Digital marketing – Digital marketing can include school or district website sponsorship, in-school digital advertising, streaming media and other applications.

Some districts have had success with such programs. For example, Zionsville Community Schools and St. Vincent Health structured a 10-year agreement to establish an on-site employee health clinic, school-based health centers and sponsorship of the athletic program, with naming rights of the athletic facilities. The agreement generated revenue for the school district, saved taxpayer resources, and extended the hospital's visible presence in the community. In addition, the Columbus, Ohio schools approved a policy allowing the district to provide building naming rights to donors who contribute a minimum of $1 per square foot of building toward new or remodeled facilities.

A strategy could also be developed to allow business corporations to promote messages on educational attainment, and other messages, such as healthy lifestyles, citizenship, etc. For example, an engineering company could sponsor a message ("If you want to be an engineer, you need to take algebra. Your opportunities in life are limitless."), which would be displayed throughout a school with the company's tag line.

However, it should be noted that some school districts have had mixed-results in sponsorship programs, where the net revenue generation is significantly less than projected and can conflict with the values of the school district.[12] IPS, the Indy Chamber and other interested parties should work with the City of Indianapolis and other organizations who have achieved success with campaigns to secure naming rights and sponsorship opportunities for public facilities. The naming rights and sponsorship opportunities process should also include a means for gaining community consensus on criteria that IPS utilizes to decide whether an individual, company or organization should be granted naming rights or sponsorship agreements.

INDIANAPOLIS PUBLIC SCHOOLS ART COLLECTION

IPS has a collection of art that numbers approximately 900 pieces. Selling the IPS art collection would not be received favorably by the community and should not be considered due to the invaluable educational significance of these pieces. However, the collection could be displayed and utilized to benefit an IPS facilities improvement plan. The artwork could be utilized in the following ways:

- Traveling art gallery – Artwork could be viewed at galleries across the county and state. Galleries could pay IPS for the use of the artwork, resulting in recurring revenue. At the same time, partnerships with other educational or art-based organizations could be developed, enhancing opportunities for art appreciation and instruction.

- Traveling art pieces – Business, foundations, individuals and community organizations could pay to lease pieces, which could be displayed in their buildings, homes, etc.

- Licensing of art collection – Artwork would be made available for reproduction to promote events, venues, etc. The artwork could be utilized to create greeting cards, calendars, wallpaper, and other print material.

A task force should be formed to determine the interest from the business community and the cultural community in the creation of a system to utilize IPS' artwork. This initiative may not be as significant a generator of revenue as other strategies, but maintenance costs could be avoided and good will could be generated through various partnerships. The Mayor's Office of International and Cultural Affairs, the Indianapolis Museum of Art, The Children's Museum of Indianapolis, the IPS Foundation, and other cultural community organizations will be vital in developing a strategy to restore and display the collection.

Additionally, this group should examine the potential of re-creating certain works for auction or use in the traveling art gallery or show and develop a process to license this art collection for reproduction and promotional purposes. A strategy to encourage businesses and foundations to help restore pieces that are damaged and/or help frame some pieces should also be pursued.

FINANCIAL MANAGEMENT PARTICIPATION IN SPENDING DECISIONS:

It has come to our attention that IPS financial management has not been included in major spending decisions, including teacher contract negotiations. A process should be implemented that includes financial management throughout the entire spending process ensuring congruency and awareness with any financial transaction.

INVESTMENT POLICY:

IPS currently has a substantial amount invested in funds concentrated in a single investment product. IPS is the dominant participant in the investment vehicle. Because IPS funds represent such a significant balance of the fund, it warrants internal review and development of a policy to oversee these investments as well as provide more frequent updates from the fund manager and reporting to the board.

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[12] Molnar, Alex et al. "Effectively Embedded: Schools and the Machinery of Modern Marketing" The Thirteenth Annual Report on Schoolhouse Commercializing Trends, National Education Policy Center, 2009-2010.

INFORMATION TECHNOLOGY

Technology solutions can be the driving differentiator that allows IPS to stay competitive in its offerings for the students and help communities reconnect with their local schools. Technology is a tool that needs to be leveraged to position IPS as the city's education leader.

A coordinated effort of IT solution distribution within the schools could effectively create a learning environment that positions IPS to compete in the 21st century as a leader in urban school strategy and effectiveness. Currently, the IT organization has worked to support business and curriculum requirements and requests as they arise, as well as implementing technology advancements to decrease operational costs to support the current IT environment, with the utilization of Information Technology continuing to proliferate throughout the entire education delivery model. Continuing to engage IT in a reactive manner will cause IT costs to increase dramatically and produce a fragmented experience for educators, students and parents. Strategic intervention and planning is required to avoid a costly and unsatisfactory end-state.

The IPS IT Department provides multiple services across all areas of IPS. At the highest level, the key types of services are: Application/Systems Development and Support, Infrastructure Services, Systems Hosting, Information Storage, Workstation/PC Deployment & Support, and Training and Network Connectivity. An overview of these services can be found in Appendix D.

RECOMMENDATIONS SUMMARY:

The subcommittee's recommendations can be divided into two types; strategic and tactical. Implementing the strategic actions will result in the most fundamental optimization of IPS expenditures on IT across the district. The continued execution of tactical actions by the IT department should be an ongoing operational expectation, as they have demonstrated to date. The top recommendation speaks to the need for high-level, coordinated leadership of IT which should guide the department's actions.

Strategic: Actions that require IPS leadership commitment and direct leadership beyond the IT leadership and department:

- Align District Strategic and Technology Planning leveraging a Chief Education Technology Officer Role. Ultimately this high-level leadership position should guide the following strategic and tactical recommendations to ensure alignment.
- Institutionalize Financial Management processes for "Total IT Expenditure Management."
- Implement Information Technology Services Standards and Roadmap:
  - o For integrated educational enablement, establish the nature, tone and culture of the senior leadership and what the unwritten, informal expectations are.
  - o Synergize grant funding requests across the district.
  - o Harmonize "supplementary eLearning aids" across the district.
  - o Investigate "Digital Text / Books" business case.
- Investigate Opportunity to Leverage Synergies of other City Department IT Services.
- Investigate Opportunity to Offer Educational IT Services beyond IPS District.
- Conduct a detailed business case analysis for Payroll Processing Modernization.

Tactical: Actions that are able to be led and executed within IT leadership and department's direct control:

- Conduct a detailed business case analysis for saving opportunities in the areas of:
  - o Helpdesk and Field Support Outsourcing.
  - o Data Center Hosting and Support Outsourcing.

RECOMMENDATIONS DETAILS:

• Align District Strategic and Technology Planning Leveraging a Chief Education Technology Officer Role:

Observation: Technology in grades K-12 is critical to the overall success of educators providing the learning tools required for educating today's students. Technology teams can no longer be the "behind the scenes team" only responsible for managing the seldom-understood underpinnings like IT servers, systems and technology. Technology is strategic. Today's technology teams need to be empowered with required visibility to work hand-in-hand with educators to provide integrated curriculum to technology enablers that are consistent, available, and secure. The educators need to fully engage the technology teams in all solution strategies. Based on prior IPS administration strategy, the role of IT operations has been more geared toward back-end solution development after the technology has been selected and not on collaboration between students, educators, administrators and IT from the beginning of the selection process. This leads to disconnects between student needs and supporting technology and financial budgeting processes.

Recommendation: Recommends that the Superintendent align the strategic planning and the technology agenda, utilizing the guidelines set out by the Consortium of School Networking. A senior Chief Education Technology Officer needs to lead the senior leadership of the school district, principals, teachers and students in a full integration of the technology systems, tools and content used to deliver instruction to the students. The Superintendent and this individual must also be willing and able to navigate the solutions available throughout the city's technology plan and work to integrate solutions wherever possible.

The effective use of technology for transformation of learning cannot occur without strong leadership and vision, as outlined by the Consortium of School Networking:

- Technology is critical and increasingly important for today's learners.
- Superintendents embrace their leadership roles as technology advocates who create the vision and set the tone for technology use in their districts.
- A superintendent's own technology knowledge and competencies typically are not where they need to be.
- There is pride in the promising technology practices in "islands" within their district, but the effective, scalable, system-wide use of technology to support student achievement largely remains an elusive goal.
- The disparate deployment of new technologies could create a greater "digital divide" yet school systems also worry that their own districts and students could fall behind on their watch if they do not invest in technology.

The leader chosen to support the recommendation should be fluent in the items outlined in the Certified Education Technology Leader (CETL) certifications.

- The CETL certification exam is based on The Framework of Essential Skills of the K-12 CTO, which is the body of knowledge defining the skill areas critical to today's education technology leaders. The Framework was created and is kept up-to-date by two volunteer panels of education technology leaders. The Framework is divided into three primary areas: Leadership & Vision; Understanding the Educational Environment; Managing Technology & Support Resources. Under each of these areas, the Framework further identifies specific responsibilities and the knowledge needed to perform these responsibilities in order to be a successful CTO in today's educational environment. All questions on the exam are tied to the Framework.

Technology leadership must be communicated to the schools from the top of the organization.

• Implement Information Technology services, standards, process and roadmap:

Observation: The Information Technology implementation should drive the process workflow and content delivery methods that position the students wherever they live with the tools necessary to compete in today's world. The IT tools, when implemented in concert across the system, will position IPS to provide the students with the content and services needed to educate.

As you will see in the current state documentation, the IT organization at IPS supports a vast variety of technology solutions across the entire school portfolio [see Appendix E]. They are accommodating the needs of each school as an individual culture and requirement set with a lean team deploying strategies effectively. It is critical at this juncture

to pull together a technology plan that leverages the best tools as they relate to the content delivery, learning management, hardware/network strategies, and workflow engines; these are the key components for the roadmap [see Appendix F]. The teams need to get ahead of the needs and create an environment where the technology is the enabler for the school, not the roadblock. This is difficult without implementing controls first and a really integrated workflow for managing new needs as they arise. A clearly communicated workflow process strategy supported by the system that enables the schools to best leverage the technology deployed will enhance the schools to a great extent.

Recommendation: IPS IT team must be a trusted adviser for the schools that is brought in early and often as solutions are discussed. The team must be a solutions consulting organization that has built a strong technology services catalog to address the needs of the schools. The school administration and teachers need to involve IT as they make decisions. IT needs to create a method of communicating what is available in this catalog that supports the needs of each administrator, teacher and student. A proactive Service Catalog strategy that markets the capabilities of the solutions currently implemented and a roadmap that communicates how future needs will be met needs to be outlined for the schools to leverage. A clearly defined plan for each school needs to be outlined so that those who are fundraising and grant writing can align their planning to the roadmap for each school. A proactive planning and communication strategy that encourages everyone to see the strong solution set available will empower and enable the schools to better utilize and leverage the IT solutions. It will also allow for better consortium buying and good technology decisions. Communication and proactive involvement is critical. This is a two-way street, both for IT and the administrations of

All initiatives require data, automation, delivery methods.	First look at the supported technology Services Catalog	Partner with Technology Team to integrate new need into IT Services Ctalog
INITIATIVE DEFINED	**CATALOGED OFFERING AVAILABLE**	**IMPLEMENT**
	NON STANDARD	**FUNDING/ TECHNOLOGY REVIEW**
		INTEGRATE INTO TECH CATALOG
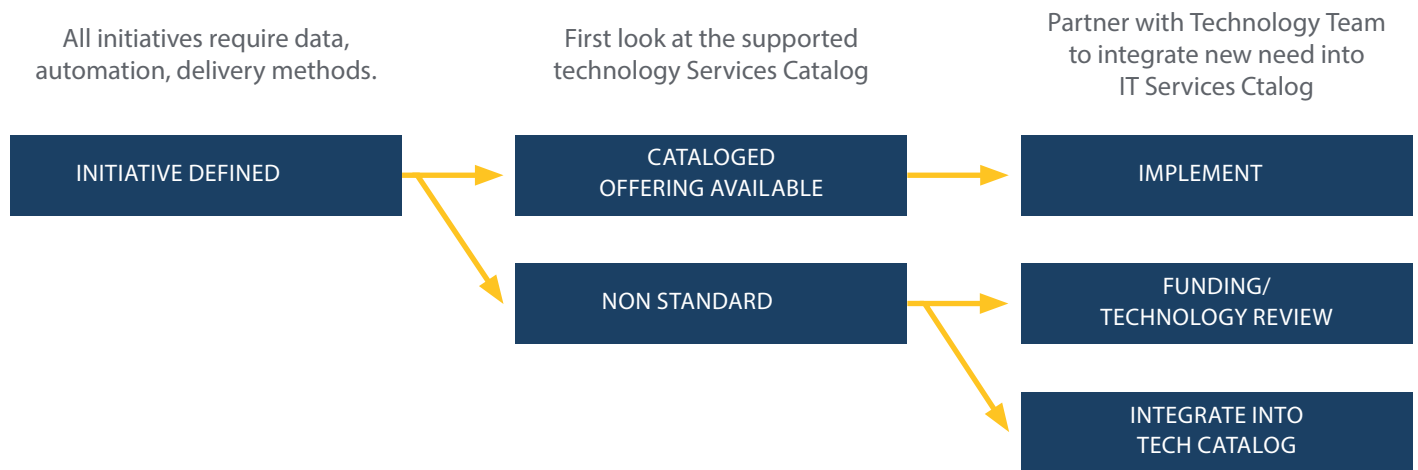
each school, so that technology needs are clearly outlined, identified, utilized and forecasted.

When discussing technology needs, it must be understood that there is a layering effect. Each decision impacts the other layers' needs. An example would be an "App" that has video elements requires more bandwidth and processing power [see Appendix F].

It is critical at this point that the eLearning suite has a backbone set of technologies that is consistent through the entire organization. This includes all common education tools. Key actions to address include:

- Establish the nature, tone and culture of the senior leadership and what the unwritten, informal expectations are for integrated educational enablement. Honor the spirit — not just the motions — of a well-governed and tightly integrated financial procurement, budgeting and educational enablement through IT planning processes.

- Synergize grant funding requests across the district. Procurement controls and grant management strategies need to be implemented that incorporate the needs of IT, including support and infrastructure requirements as it is related to education delivery and process workflow systems.

- Harmonize "supplementary eLearning aids" across the district. The implementation of technology utilization strategies needs to start in each classroom with each teacher, built into each school and integrated into the overall technology backbone planning. The IT organization needs to provide the outline of solutions offered to

achieve the objectives of the schools. If a school wants to leverage a certain tool set, they need to build it into the fabric of the classroom, school and infrastructure plan. This will enable schools to better leverage the technology, infrastructure and support available. The grant teams that are looking to deploy more solutions and technology for a specific school like PTA would leverage this planning and confirm it meets the roadmap outlined for the school.

- Investigate "Digital Text" business case. The full integration of digital texts — which help students better leverage the delivery of content options — needs to be a clear roadmap formulated by the schools and teachers that are the early adopters of these solutions. User groups / communications strategies need to open up the wealth of information available within the district, breaking down the walls between departments and school environments to cross-pollinate and educate teachers and students. Look for pilot environments and leverage PM strategies for roll out / roadmap planning.

TECHNOLOGY PLAN **FOR STUDENT**

TECHNOLOGY PLAN FOR TEACHER

TECHNOLOGY PLAN **FOR DISTRICT**

DEFINE TECHNOLOGY **TOOL KIT**

FULL ACCOUNTABILITY

• Institutionalize Financial Management processes for "Total IT Expenditure Management":

Observation: Information Technology expenditures at IPS are fragmented across the organization with limited controls, planning or visibility. The "centralized" IT departments only represent a portion of IT related expenditures within IPS. Expenditures on computers and educational software, as examples, are purchased by individual school budgets or other decentralized grants/donations. Lack of holistic cost understanding and engagement in decisions to buy have cost and resourcing implications on the central IT department. Without the appropriate process and controls, decisions are made by areas outside of IT without planning the "total cost of ownership," which often include additional IT infrastructure costs and ongoing support. For example, individual contributors at schools apply for grants and do not include ongoing maintenance costs in the grant submission, requiring the IPS IT and Finance departments to find funds to continue supporting these educational enablement grants once the grant funds expire. These additional funds are not usually planned for in the annual budgeting process, and require last-minute expansions of the budget exceeding planned amounts. Savings that are generated by efficiency activities by the IT department are then needed to cover these unplanned expenses caused by other groups, impacting the IT department's ability to self-fund required life cycle management or capability improvements.

Recommendation: A formal IT governance and budgeting process needs to be identified. This process needs to include annual planning that incorporates all known IT costs and include forecasts for unknown costs based on actuary data from prior years. Controls need to be put in place to provide the guidelines around timing, process and budget submission request artifacts to help guide educators during the grant submission process. The budgeting process needs to follow a defined process where annual corporation goals are outlined at the school level, central IT level, and at the administration level; go through a formal consolidation, review, and update process, and then are aggregated to form a unified annual IT plan that is sent to the school board / commissioners for funding approval.

• Investigate Opportunity to Leverage Synergies of other City Department IT Services:

Observation: IT convergence needs to be done, pulling the technology needs of telecommunications — Voice over IP, security, hardware and systems management within the fabric of the IT organization. The technology needs are so great in these areas that they must converge, leveraging the infrastructure, people and tools available. The infrastructure services currently provided by IPS IT [see Appendix G] are common services that are foundational to most organizations. A strong and broad IT infrastructure is how education content is delivered today, and students need access in their schools and homes.

Recommendation: Implementation of common shared IT services, leveraging the overall budgets and assets of the city, could yield cost savings for IPS. The task force recommends commissioning a review of the infrastructure systems and help-desk strategies leveraged by the city and state, assessing the opportunity for consolidation of infrastructure needs for city services. The IPS' fiber backbone could be a key element of this overall city infrastructure plan, with the ultimate goal of providing education WiFi infrastructure and device support for IPS' students' homes and communities. This may seem aggressive, but IPS has already piloted options like this. Through partnerships and strategic alignment, this type of solution is within reach.

• Investigate Opportunity to Offer Educational IT Services beyond IPS District:

Observation: There is an opportunity to leverage the sophisticated and lean IT strategy team to offer services outside of the IPS environment to charter, private and other school districts with smaller support engines. Adding schools once the systems are implemented would be a manageable opportunity for the organization. Once these service packs are better established, there could be a revenue or business strategy to offer these solutions. The IPS team has showcased the ability to push technology, innovate with vendors, deploy best practices and offer support solutions to schools. The IPS team has discussed and strategized this option and sees it as an opportunity for the district.

Recommendation: Conduct a study to determine the feasibility of providing services for fee to other educational districts as it relates to the K-12 education vertical by rebranding service packs and solution teams.

• Conduct a detailed business case analysis for Payroll Processing Modernization:

Observation: The current IPS payroll processing model utilizes manual data entry methods and staffing. Costs associated with data entry and payroll processing reside within the IT department. The advances to modernize the distribution of funds via direct deposit and moving to paperless pay-advice notification have increased cost efficiencies. The process step of "time capture and tracking" remains very manual and inefficient.

Recommendation: Conduct a detailed business case analysis of the opportunity to modernize additional steps of the payroll processing, including "time capture and tracking."

• Conduct a detailed business case analysis for other saving opportunities:

Observation: The IPS IT team has worked diligently to pursue multiple cost-savings initiatives within the IT budgets, resulting in cost reductions, increased efficiencies, and enhanced capabilities [see Appendix H]. The current "Helpdesk and Field Support" and "Data Center Hosting and Support" models are operating effectively, addressing wide ranges of support needs (for PCs, equipment, network connectivity, applications, multimedia streaming, online assessments, etc.). The cost structures do not appear to be significantly outside market-driven costs. Yet with the growing breadth to solution inventory, expanding externalization of educational content, and increasing integration of IT into the daily educational delivery, the current in-sourced model and resourcing level may not be able to provide the level of service required, considering scalability and agility.

Recommendation: Conduct an assessment of the external market for the breadth of:

  • Helpdesk and Field Support Outsourcing

  • Data Center Hosting and Support Outsourcing

Both current and future district and IT strategies must be included in these analyses. The results will determine if the current state model is cost competitive, scalable, and sustainable. The potential future state resourcing model may be a "hybrid" model that leverages internal resources and external (outsourced) service providers.

CONCLUSION

The challenges facing IPS are significant and complex. The Indy Chamber and the Indianapolis business community have a clear, vested interest in the success of IPS. Through the IPS Operational Analysis, participants engaged in study for the specific purpose of analyzing and developing business-based recommendations, in alignment with IPS, to address a $30 million budget deficit forecasted for the 2014-2015 fiscal year. This report focuses on spending, and with the exception of certain areas such as grants management, capital fundraising and innovative business approaches to attracting new revenue streams, the report abstains from the revenue side of IPS' budget challenge.

Collaboratively working with IPS administrators and the Indy Chamber, the volunteers for the IPS Operational Analysis developed the above recommendations based on individual areas of expertise in business. It is important to reiterate that the aim of this project has been to abstain fully from any issues of educational policy or curriculum. These recommendations are intended to spark dialogue and meaningful change to ensure the sustainability of IPS.

The two largest areas of opportunity for efficiency are found through improvements to processes associated with human resources and facilities. Personnel expenses comprise approximately 90% of the General Fund. The recommendation to better manage this headcount is critical to closing the projected budget deficit. IPS must continually benchmark performance on key indicators against relevant peers and institute a system-wide performance improvement framework, such as the Baldrige Criteria. And, where deviations from such comparable districts are not justifiable, action must be taken to better align with benchmark data.

The recommendations to review and pursue right-sizing, multi-use facilities, consolidation and other tactics to maximize the value of facilities — which in some cases warrant closing certain overlapping facilities while preserving the benefit of community presence — will drive cost savings across the other three categories of review. The report provides several facilities recommendations that are ripe with savings opportunities.

Additionally, it is the collective recommendation of the IPS Operational Analysis that IPS engage in a holistic review and ultimate design of an overall system management process. Throughout the recommendations, there are numerous references to benchmarking through organizations such as the Council of the Great City Schools and/or other resources that represent opportunities for IPS to measure itself and to gain knowledge that it can apply systemwide. As another example, the Baldridge Education Criteria for Performance Excellence and other similar programs can provide criteria, as well as standardized and proven processes and practices to manage operational matters applicable to IPS and its current challenges.

While further study is needed in numerous areas to produce a specific target for cost savings — something this report does not purport to represent — overall, by adopting this set of recommendations — from staffing and facilities to energy savings and data management — IPS can overcome its present budget deficit. The potential for savings far exceeds the current $30 million shortfall. While some recommendations require upfront capital outlays, the ultimate cost-savings opportunities for the near- and long-term are significant. Perhaps most importantly, these recommendations will help IPS establish a framework and processes to continue to effectively manage resources in the future.

Above all, the recommendations of the IPS Operational Analysis are intended to help IPS direct the greatest possible resources into its classrooms and to the direct benefit of all students, their families and the community. The Indy Chamber and its volunteers are committed to continuing to cooperate and collaborate with IPS in this pursuit!

REPORT SUMMARY

The attached report shows 54 IPS schools and categorizes them by their grade level. Schools that are called out have some type of opportunity and/or challenge that stands out from the data as presented by the IPS Facilities department. Note that the intent of this report is to highlight certain conditions that exist in connection to these schools and to offer possible suggestions for change or improvement.

This report is a summary highlighting select schools in the IPS Facilities chart that have some type of opportunity or challenge. It excludes support services, alternative schools, storage/warehouse and 2swing schools. It is important to note that while the NEO report focused on A and B-level schools, we have placed an emphasis on A through C schools, making the assumption that a C school could have greater opportunity for positive growth if certain remedies were performed.

There are ten (10) "A" schools.
Of these, five are K-6; three are K-8; one is a Pre-K – 8 and one is 2-8.
Average utilization for all 10 schools is 85%.
All but 3 schools are in areas planned for redevelopment or have been subject to redevelopment in the past.
A Recommendation in the 2002 IPS Facilities Strategy Task Force Final Recommendations noted that Naming Rights and Sponsorship Opportunities in exchange for revenue should be explored. Sponsors for these "A" Schools include the following possibilities:

School	Anchor Institution/Neighborhood Stakeholder
Meredith Nicholson Elementary School	Marian University
Carl Wilde Elementary School	Marian University
Ernie Pyle Elementary School	Indianapolis Motor Speedway, IUPUI, IU Health
James W. Riley Elementary School	Butler University, Crown Hill Cemetery, Indiana State Fairgrounds
Center for Inquiry I	Residential Developers: J.C. Hart, Whitesett Group, Barrett & Stokely, Flaherty & Collins Schmidt Associates, Riley Area Community Development Corporation
Center for Inquiry II	Butler University Café Patachou/Napolese Sullivan Hardware
Merle Sidener Gifted Academy	Glendale Mall Associates Kite Development Lowe's, Target, Macy's
Rousseau McClellan Montessori	
Arlington Woods Elementary School	Eastern Star Church
Frederick Douglass Elementary	

ACTION ITEMS:

- Explore and document why these schools are "A" schools in order to replicate elsewhere.
- Seek additional opportunities for sponsorship opportunities.
- Gather population data and trends for these school areas.
- Explore energy efficiencies and additional ways to cut operating costs.

There is one (1) A/D school which is at 55% utilization.

Crispus Attucks Medical Magnet (6-12) has a very large campus in a key redevelopment area of the City (16 Tech, UNWA, Riverside). The school is on the National Register of Historic Places. In 2006, Superintendent Eugene White designated Crispus Attucks as a medical preparatory school largely because of its proximity to the IU School of Medicine. The school is approximately 248,000 square feet spread out over 15 acres. It has a football stadium, track & field and soccer fields.

ACTION ITEMS:
- Gather population data and trends for this area.
- Consider joint use opportunities.
- IU School of Medicine and IU Health possible sponsorship opportunity.
- Explore energy efficiencies and additional ways to cut operating costs.

There are five (5) B schools.

Three are K-6; one is K-8; and one is 7-8.

Opportunity: **Robert Lee Frost Elementary School** is a K-6 with 81% utilization. It's located near Cathedral, which is starting a new master planning effort. Recent positive redevelopment has begun at the corner of 56th & Emerson in the retail center which once was the O'Malia's site. The Millersville neighborhood association is very strong and represents a contingent of wealth which desires to see this corner revitalized. Former superintendents Eugene White and Pat Pritchett live in the neighborhood close to this school.

Opportunity: **H.L. Harshman Math Science World Language Center** (School 501) is a 7-8 school at B-level. Its utilization is at 37% partly because of its size 121,444 square feet. Harshman is part of the 78 acre campus that includes Arsenal Tech High School and Theodore Potter Elementary, Located at 10th & Woodruff Place, it's located in the "Super Bowl Legacy" redevelopment district and serves as a major anchor in this neighborhood. Failing schools that are close include **Theodore Potter Elementary** (K-6, D-Level, 60% utilization) and **Brookside Elementary** (K-6, F-Level, 88% utilization). Brookside Elementary has a large Hispanic and transient student population.

A Recommendation in the 2002 IPS Facilities Strategy Task Force Final Recommendations noted that Naming Rights and Sponsorship Opportunities in exchange for revenue should be explored. Possible sponsors for A Schools include the following suggestions:

School	Anchor Institution/Neighborhood Stakeholder
Robert Lee Frost Elementary School	Millersville Neighborhood Association
Francis W. Parker Montessori	Citizens Energy Group
H.L. Harshman Math Science World Language Center	IRedevelopment Group, Indy Asset East, Angie's List
James A. Garfield Elementary	Cardwell Hardware
Stephen Foster Elementary	

ACTION ITEMS:
- Explore and document why these schools are "A" schools in order to replicate elsewhere.
- As Theodore Potter Elementary is on Harshman's campus, explore why this is a D-level school. Seek ways to improve this school's performance.
- Gather population data and trends for this area.
- Consider joint use opportunities for Harshman and Potter for revenue generation until school utilization improves.
- Seek additional sponsorship opportunities for each school.
- Explore a Cathedral/Robert Frost connection?
- Explore energy efficiencies and additional ways to cut operating costs.

There is one (1) C/B school.

Broad Ripple Magnet School for Performing Arts is a 6-12 school that's only 31.77% utilized. Its building is massive at 374,913 considering its location on 15 acres. The school has a football stadium and is located on prime real estate in the heart of Broad Ripple, which is an area undergoing transformative projects, i.e. parking garage, Whole Foods, new multi-family housing, etc. Park Tudor is a private school close to Broad Ripple that competes for students who left this school.

ACTION ITEMS:
- Explore and document why this school is a C/B ranked school.
- Consider sponsorship opportunities within the Indianapolis arts community.
- Gather population data and trends for this area.
- Consider joint use opportunities for revenue generation until school utilization improves.
- Explore energy efficiencies and additional ways to cut operating costs.

There are five (5) C schools.

Four are K-6 and one is K-8. Average utilization is 77% with one exception..

Opportunity: George W. Julian Elementary on the City's east side is 65% utilized. This school is located on East Washington Street in Historic Irvington which is a key redevelopment area. Nearby anchors include Community East Hospital and Angie's List.

Opportunity: Cold Spring School (K-6, 78%) is located within the heart of Marian University's campus. Marian President Dan Elsner has expressed his desire to acquire the property on which this school sits for the university's campus expansion.

School	Anchor Institution/Neighborhood Stakeholder
Jonathan Jennings Elementary	Marian University
Lew Wallace Elementary	Marian University
Cold Spring School	
Daniel Webster Elementary	Eli Lilly, Redeveloper of GM Stamping plant
George W. Julian Elementary	Community East Hospital, Angie's List

ACTION ITEMS:
- Seek opportunities for sponsorship opportunities.
- Gather population data and trends for these school areas.
- Consider selling Cold Springs School property (36.5 acres) to Marian University.
- Consider joint use opportunities for George W. Julian Elementary.
- Explore energy efficiencies and additional ways to cut operating costs.

There is one D/C school.

Opportunity: **George Washington Community Jr.-Sr. High School** is a 7-12 located on West Washington Street. This is another large campus with a football stadium, pool, track and baseball fields located in an area with a large Hispanic and transient student population. Current utilization is 42%. This school is near historic Central State, which is an area currently being redeveloped by the City. Other redevelopment opportunities in the area include the redevelopment of the GM Stamping plant.

ACTION ITEMS:
- Explore and document why this school is a "D/C" school.
- Seek opportunities for sponsorship opportunities.
- Gather population data and trends for these school areas.
- Consider joint use opportunities for revenue generation.
- Explore energy efficiencies and additional ways to cut operating costs.

There are 11 D schools.

Nine are K-6; one is 6-12; and one is 9-12.

Opportunity: **Shortridge Law and Public Policy Management** is a D school with 37% utilization. The school is approximately 296,000 square feet and its campus is large (9.35 acres) with a stadium and pool. Shortridge is located on Meridian Street in close proximity to Downtown Indianapolis and urban redevelopment.

Opportunity: **Arsenal Technical High School** is a massive campus spread over 78 acres. The buildings include nearly 867,000 square feet of space which includes four magnets and one small non-magnet school. Arsenal Tech was placed on the National Register of Historic Places in 1976 and was part of the 2012 Super Bowl Legacy Project to renew and restore the City's east side.

Opportunity: **Christian Park Elementary** (K-6) is a D school with 107% utilization. It is located on the City's southeast side near Brookville Road. There are two other D-rated K-6 schools close to this school: **Eleanor Skillen Elementary School** (D-73%) and **Paul I. Miller Elementary School** (D-67%). **Paul I. Miller Elementary School** is within 500 feet of a rail line.

Three D schools that are ground leased on City park land in potential redevelopment areas include:
- **Wendell Phillips Elementary School** (K-6, 63%, 16 Tech/White River)
- **William Penn Elementary School** (K-6, 76%, GM Stamping)
- **Christian Park Elementary School** (K-6, 107%, East Washington Street/Ford Visteon/Navistar)

ACTION ITEMS:
- Explore and document why these schools are "D" schools.
- Seek opportunities for sponsorship opportunities.
- Study the viability of closing Paul I Miller Elementary and consolidating students into Christian Park and Eleanor Skillen.
- Gather population data and trends for these school areas.
- Explore energy efficiencies and additional ways to cut operating costs.

Of the fifty-six (56) graded Indianapolis Public Schools, twenty-two (22) are F schools.

Nineteen (19) are K-6; one (1) is K-12; and two (2) are 7-12.

James Russell Lowell Elementary School is a K-6 with strong utilization (95%) located near Martin University. Former Superintendent White's recent appointment as permanent Dean of this university presents an opportunity for a partnership with this school.

Key Learning Center is 13.5 acres right on the White River just south of the GM Stamping Plant. Separating the two sites is Oliver Street which features a new bridge over the river. This K-12 is an F school with 72% utilization. This land may be more valuable for redevelopment in connection with GM

Washington Irving Elementary School (K-6, 53%) is located in an area that's being redeveloped with high end single family homes, Flat 12 microbrewery and the Goose the Market production facility. The president of the Holy Cross neighborhood association, Pat Dubach, also invests in the redevelopment of this area.

Anna Brochhausen Elementary School (K-6, 98%) is located across the street from Community East Hospital which has expressed interest in contributing to the redevelopment of this area.

Williams McKinley Elementary School (K-6, 87%) is located within 500 feet of a rail line.

Raymond F. Brandes Elementary School (K-6, 67%) is located near University of Indianapolis, which has undergone a community and school-wide strategic planning effort to build its school and positively impact the neighborhoods. One of U of Indy's strategic goals is to partner with a charter school to be located on its campus.

ACTION ITEMS:
- Explore and document why these schools are "F" schools.
- Seek opportunities for sponsorship opportunities.
- Gather population data and trends for these school areas.
- Consider transferring Key Learning Center property on the White River (13.5 acres) to City for GM Stamping redevelopment.
- Explore duplicity in schools based on geographic areas, population growth/decline trends, costs to operate/upgrade and utilization.
- Explore energy efficiencies and additional ways to cut operating costs in saved schools.

REPORT SUMMARY

A side-by-side comparison of the maps showing A-C schools and D-F schools shows a significant lack of quality public education on the City's northeast (Lawrence area), east and southeast (Brookville Road) sides.

Five F schools are located within 1.5 miles of each other on the northeast side and of these five, four are K-6 and one is 7-12.

John Marshall Community School (7-12) sits on 43 acres and is only 43% utilized.

Northeast side schools, **Charles W. Fairbanks Elementary School** and **Francis Scott Key Elementary School** are K-6 schools that are 89% and 62% utilized respectively. Both schools are within ½ mile of each other.

Schools with stadiums and campuses should be preserved, as they can become educational anchors in the community.

Of the seven listed below, three schools are in the A-C range:
- H.L. Harshman Math Science World Language Center – 78 acres
- Crispus Attucks Medical Magnet – 15 acres
- George Washington Community Jr.-Sr. H.S. – 16.03 acres

Four are D,F schools:
- Shortridge Law & Public Policy Management – 9.35 acres
- Arsenal Technical High School – 78 acres
- Northwest Community School – 40 acres
- John Marshall Community School – 43 acres

Arsenal Tech and Harshman have a special opportunity to positively impact the near eastside neighborhood, since both campuses are within blocks from each other.

Schools in partnership with the City of Indianapolis Department of Parks & Recreation should be reevaluated.

Indy Parks desires to share park property with schools, as doing so helps to alleviate part of the City's park maintenance budget. A thorough analysis in conjunction with Indy Parks is required to see whether or not this partnership has continued to be productive for both parties.

ACTION ITEMS:
- Provide documentation on shared amenities, e.g. pool, and how maintenance and usage is shared.

Downtown Indianapolis has a shortage of quality public instruction and daycare compared to downtown's upward redevelopment.

The Center for Inquiry I is the only "A" school located downtown, at 725 New Jersey. Otherwise, the other downtown schools are D and F rated. IPS has an opportunity to create partnerships with charters and day care operators to provide quality childcare and educational opportunities to new families moving into downtown housing.

The Lafayette Square area has four quality K-6 schools that are A-C ranked schools which present an opportunity for targeted redevelopment of this area.

- Jonathan Jennings Elementary – K-6
- Meredith Nicholson Elementary School – K-6
- Lew Wallace Elementary – K-6
- Carl Wilde Elementary School – K-6

Lafayette Square-based Northwest Community School, 7-12, is an F school.

ACTION ITEMS:
- Explore housing stock and population data/trends for this area.

APPENDIX B: DECISION MAKING PILOT

SOLUTION CONCEPT

The proposed solution concept is designed to allow for the systematic review of an issue or concept, determine the relative important issues and move them along to the writer of the final report. It is a vehicle to provide a factual assessment of a particular proposal, submit relevant data and projections, and to overall "rate" the new concept, idea or strategy.

This process is designed to encourage input, direction, clarity of impact and identification of anticipated outcomes. Through this design, this concept is intended to create an avenue to change negative thoughts and assumed perceptions into a positive force that could be a leading agent for change within the organization. There are three primary components to the solution concept: process, tools and roles.

Process

The concept employs a cross-functional assessment of 'significant change proposals' coming from the Superintendent, wherein an Impact Assessment Tool is employed to drive data collection, analysis and ultimately a functional summary of impact and recommendations, at a functional level and cross-functional level. While the individual functional assessments will be done 'off-line' within each function, the results of these assessments will be reviewed and discussed within a cross-functional forum. The results of the functional assessments will be summarized and provided to the Superintendent, ultimately to facilitate a structured, repeatable and data-driven decision making process.

Tools

The proposed process will be conducted via use of the Impact Assessment Tool, consisting of:

- An Assessment Summary, with categories for assessment, specific points of assessment within each category, operational definitions and data sources. Each function will be responsible for identifying the categories, etc., relevant to their function, and maintaining that template going forward.

- A Ratings Matrix, wherein the function will quantify their assessment of the proposed change, considering Concept and Cost, on a scale of 1 to 10, respectively.

Roles (new roles identified by **bold** font):

Role	Responsibilities
Superintendent	• Trigger the Impact Assessment Process • Apply the Impact Assessment Summary to the decision making process • Champion use of the Impact Assessment Process
Process Owner	• Facilitates execution and continuous improvement of Impact Assessment Process
Functional Leads	• Develop and maintain the Assessment Summary for their respective function • Execution of the Impact Assessment Process within their respective function • Represent their respective function in the cross-functional dialogue
Impact Assessment Summary Author	• Create of the Impact Assessment Summary for presentation to the Superintendent

KEY ASSUMPTIONS, CHALLENGES AND RISKS

Assumptions

- The educational benefit of a particular proposal, as it relates to student achievement, will be verified prior to triggering the Impact Assessment Process.

- The Impact Assessment Process is designed to encourage independent assessments of proposed changes.

- Communication is both vertical and horizontal, by design.

Challenges

- IPS must comply with federal, state and local regulations, which can impact timelines.

- There are various milestones within the budgeting process that could have an effect on the Impact Assessment Process.

Risks

- Lack of a named Process Owner. Beyond that of the Champion, this is the most important role for both implementation and sustainment of the proposal.

IMPACT ASSESSMENT PROCESS PILOT

The following instructions were provided to the pilot participants from Tricia Frye 11/11/2013:

"Below are the meeting notes regarding the Chamber of Commerce Assessment Tool. I have attached the documents we discussed last week.

1. Overview - Several divisions are working with the Chamber of Commerce to complete assessments for various areas of responsibility. Facilities and Planning is a subcommittee of the Operations committee and is broken out into strategy and process teams. The process team has been tasked with creating an assessment tool to determine the best use of buildings by analyzing various aspects of a facility (see Chamber of Commerce 11-06-2013 document). The subgroup realized Facilities/Planning cannot operate in a vacuum and other departments must be involved if we are going to provide the decision makers with valid data. The Logistics Team will play a key role in the proposed process because all key players for that function are at the table.

2. Assessment Tool - The assessment tool (see Chamber of Commerce 11-06-2013 document) is attached to this email and can be modified by all departments to meet their needs. The process team brainstormed and came up with some categories that might be used by a department to create their own assessment but department heads and employees have a much greater understanding of their categories so please feel free to add and remove categories in the "Examples from Various Departments" document and use those in your assessment tool. If your department is not listed, we would still like you to participate. We were focused on Operations and know there are things we left out; that is why we need your help.

3. Assumptions - Please see the "Proposed IPS decision making process using Impact Assessment Tool v3_ with comment.pdf" document. This is the proposed process to be used when a new program, building closure, reconfiguration or other large scale project is proposed. Our primary assumption is that, before the logistics team received the proposal for analysis, Curriculum and Instruction has already assessed the proposed and has deemed it to have an educational benefit. If Curriculum and Instruction rejects a proposal, the Logistics Team will not analyze the proposal.

4. Proposed Scenario - Please remember that this is a hypothetical scenario that is not currently proposed by anyone. This scenario was created by the CoC Process Team to give the Logistics Team an opportunity to analyze a project based on the assessment tools each of you create to score the proposal. The hypothetical scenario is that School 31 is proposed to be a K-8 STEM magnet. School 31 was selected because it has special education classes, an alternative program and is a boundary school. This provides some complexity and a realistic scenario. I understand that you do not have many details on the project and that is not a bad thing. Make your own assumptions, when necessary but document them. (AGAIN, THIS IS NOT A REAL PROPOSAL).

5. Action Items-

    a. Each department will create an assessment tool using the "Chamber of Commerce 11-06-2013" document as a template. Each department will determine its own 10 criteria to be used in the assessment tool. (Curriculum and Instruction will assess the proposal prior to this step).

    b. Each department will use their tool to analyze the School 31 proposal (We are assuming Curriculum and Instruction gave this proposal a score of 8). If you do not want to use Concept or Cost as your categories in the rating matrix, they can be changed. Also be advised that scoring is subjective. (Facilities and Planning are deeming concept to be anything that is not included in the cost category. That is what we determined for our scoring but you may use other rating categories.)

    c. Each department will score their criteria and use the scoring template which is a tab in the Chamber of Commerce 11-06-2013 document. We need a combined score for your department to determine whether or not this proposal is acceptable.

PILOT PARTICIPANTS

Name	Title / Function
Sandy Hubbard	Purchasing Agent
Deb Hineline	Chief of Financial and Business Services
Jane Cookson	Director of Food Services
Bill Rossetter	Supervisor of Warehousing
Sandy Bombick	Position Control/HRIS Manager
Rocky Grismore	Director of Office of Student Assignment
Soureh Sedigh	Supervisor of Office of Student Assignment
Jackie Greenwood	Executive Director of Secondary Education
Debbie Abernathy	Information Technology/Administrative Systems Manager
Deb Leser	Director of Career and College Readiness
Robb Warriner	Director of Special Education
Cynthia Roach	Director of Research, Evaluation and Assessment
David Gurola	Transportation Routing Manager
Stan Cork	IT Transportation Systems Manager
John Perkins	Controller
Francisco Valdiosera	English as a Second Language Program Coordinator
Joan Harrell	Executive Director of Elementary Education
Tricia Frye	Planning Supervisor
Doug Bye	Director of Facilities

PILOT RESULTS

The following areas presented their overall rankings and supporting comments:

Function	Score
Budget and Finance	5.33
Facilities and Planning	5.25
Special Education	5.15
Food Service	5.25

Several departments did not have a score because they needed more information. This informed the conclusions that the process may need to be less parallel and more sequential or 'tiered', as some departments (i.e., 'tier 1) must answer questions related to their areas prior to subsequent departments (i.e., 'tier 2') scoring for their area.

One topic that came up several times is that most departments are connected and rely on each other. Transportation, Human Resources, IT and Office of Student Assignment see themselves as a tier 2 or 3.

CONCEPT FEEDBACK
Difficulty in Execution - ratings

KEY

5 = Very Easy

4 = Easy

3 = Not easy, Not Difficult

2 = Somewhat Difficult

1 = Very Difficult

■ 1 = 1 Particpant Vote
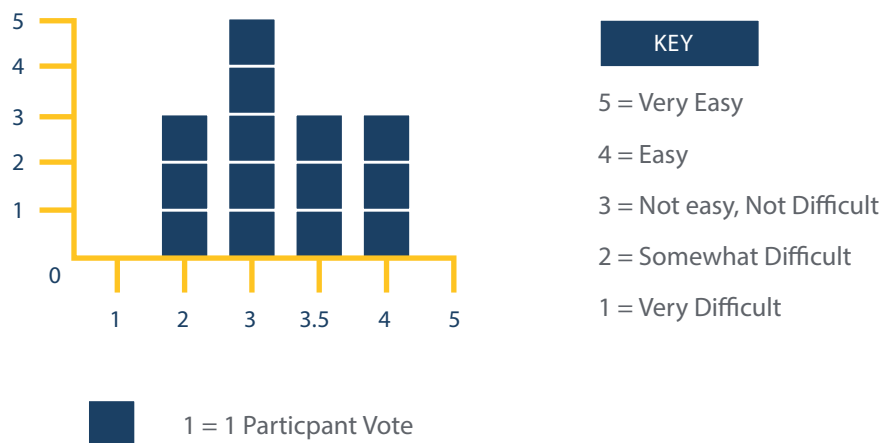
Difficulty in Execution - participant comments

- This exercise forced us to commit to paper what we always do.
- Difficulty in executing?
- A lot of variables as to boundary, Sped kids, location of students, Tie of routes.
- Not easy, not difficult. Had to consider the impact on programs other than the one we talked about. Everything was - if we do this who / what will it impact.
- Need specifics to be able to apply.
- Had some detail questions regarding STEM program requirements.
- One Building. Done it before. Existing Facilities. Everything is harder than we think.
- As soon as I heard the tiers I knew where my role [was], felt it got easier.

Process Desirability – ratings
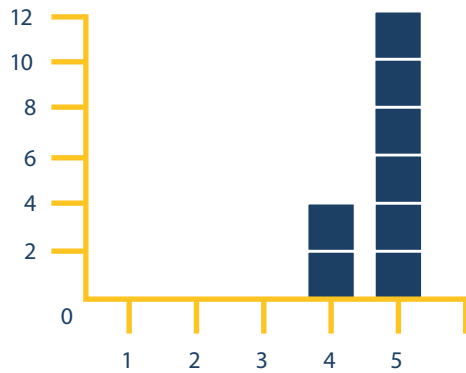
1 = 2 Particpant Votes

KEY

5 = I will actively support the use of this process!
4 = I see some benefits to the use of this process.
3 = I have no opinion on this process.
2 = I see no real benefit to the use of this process.
1 = I am actively opposed to the use of this process!

Process Desirability – participant comments

Comments	Themes
How do we continue to assess the process to make sure we stay on track?	Continuous improvement
Need more support - the top-level buy in is the main thing.	Leadership commitment needs
We need support to make the changes	
Scoring was difficult, but the experience was priceless. With additional guidance and time, I would have given it a "5"	Training and support needs
More assistance is needed so that it is implemented with Fidelity.	
Process is great, but I need more training.	
I need additional information on the process. "Training" is important.	
I think it should be difficult because there is a lot of information that should be analyzed.	Miscellaneous
Would have been able to give more detailed feedback if more details on student population and size were provided.	
If all materials are the same as other schools it will not change.	
This is needed!!!!	General endorsements
This is process is necessary so we make the best decisions for students.	
Process long overdue.	
Silos coming down.	
To be successful and improve our education programs we have to stop working in a vacuum.	
I attended the meeting last week for the first time. Glad to have been invited.	
I like/need the idea of planning / process. I'm not yet sold on this specific process - don't fully understand it.	Needs to be customizable
Each department needs their own process to collect needed information.	

Risks or barriers to implementation – participant comments

Risks and Barriers Comments	Theme
No buy-in from top tier.	Leadership support
Fear of slowing down the desires of administration.	
As the superintendent goes, so does the district. He must be on board.	
Lack of support from upper management would probably doom process.	
Decision makers won't listen, will get back to a "just make it work" mentality.	
Ideas to be implemented and changes made must be made with the thought of a timeline.	Miscellaneous
Having outside groups come in is always a risk, because you don't know how they will share what they learned in the public arena.	
Collaboration/communication early in the process.	
Transportation risks - data requirements change frequently. Time impacts quality of service.	
Getting everybody involved in this process is important.	
Training and lack of continuous support.	Training and support
More training.	

INPUT AREAS OF CONSIDERATION

CURRICULUM INSTRUCTION	BUDGET FINANCE	FOOD SERVICE	HUMAN RESOURCES	INFORMATION TECHNOLOGY	FACILITIES PLANNING	PATRONS	POLITICAL	PURCHASING	TRANSPORTATION

INPUT AREA: FACILITIES / PLANNING

DEFINITIONS

1 LOCATION SIZE	2 CONDITION	3 AGE	4 CAPACITY	5 RENOVATION	6 CURRENT PROGRAM	7 ADDRESS	8 ATHLETIC FACILITIES	9 PARKING
Total acreage of site Design and size of the structure(s)	Facility assessment of overall condition "as built"	Suitability/capacity of building Date of any renovation	What grade(s) are being served	Actual/physical allocation	Athletic facility inventory	Number of spaces available

DATA SOURCES

Surveys	Capital Projects Plan Documents	Historical Data Student Capacity	Capital Projects Plan	Present Grade Configuration	Historical Data	Grade Configuration	Site Plan
Site plans	Engineering Reports	Student Sq. Ft. Calculation	Bond Construction Fund Report	Classroom Composition	Geographic Information	Existing Structure(s)	Aerial Mapping
Architectural Drawings	Contractor Reports	Corporation Competitions	Installation/Certifications	Bond M&S At-Sproposal	System (GIS)	Sport Requirements (IHSAA Architectural Drawings)	
Accumulated Historical Data	Department Inspections	Client Site Restrictions	Equipment Warranties		Postal Service Notification	Condition [Seen 1 and 2]	
Aerial Mapping Services	Data Warehouse Information						

RATING MEASUREMENTS (See Ratings Matrix)

HOW WILL THE TOOL BE USED:

Each of the TEN INPUT AREAS will conduct their own assessment to then provide an evaluation score for each area.

Using these results a Summary of the data can be reported and either recommended or not recommended by the Core Leadership Team.

CONCLUSIONS

By reviewing the scores from each area an "overall score" can be computed.

IMPACT ASSESSMENT SUMMARY

The total impact assessment from the FACILITIES / PLANNING input area will be 1 of X for the total CORE LEADERSHIP ASSESSMENT

AFTER REVIEW, THE TOTAL IMPACT ASSESSMENT TOOL MUST HAVE AN OVERALL RATING OF 5.5 AND ABOVE TO BE CONSIDERED FOR FURTHER STUDY ...

Logistics Team - Functional Representation

- Information Technology
- Transportation
- Research, Assessment and Evaluation
- Planning Department
- Alternative Education
- Business Office
- Food Service
- Secondary Education
- Elementary Education

- Facilities Management
- Human Resources
- English as a Second Language
- Special Education
- Title I
- Office of Student Assignment
- Purchasing
- Warehousing

IPS TASKFORCE CHART SUMMARY

Indianapolis Redevelopment

When the City looks at selecting an area for redevelopment, it looks at the neighborhood's ability to facilitate transformative and sustainable change, the strength of the neighborhood economic development organization, nearby anchor institutions, and the existence of a redevelopment plan. The intent of this report is to highlight IPS schools by grade level in relation to their respective neighborhoods, nearby anchor institutions, and current or planned economic development or redevelopment investment. The goal is to inform future decisions that may be made to right size the district and plan future expansion/improvements to certain schools.

Following is a brief narrative on specific redevelopment areas and/or neighborhoods that are mentioned in the summary.

Redevelopment Areas Defined
Lafayette Square: This area is from I65 west along 38th Street to I465 on the west side. It includes Lafayette Road to High School Road, and 34th Street to 42nd Street. Lafayette Square Mall is virtually abandoned and many other retailers have left numerous strip centers. Crime and blight is abundant. Yet, this area serves the west side including Marian University and Town of Speedway. Therefore, the City continues to explore ways to redevelop the area into an international center because of the proliferation of a widely varied ethnic population.
Smart Growth District: This District is a neighborhood minutes from downtown Indianapolis that is north and east from 16th Street north along the Monon Trail. It is being reborn as a vibrant and sustainable community that is a model for neighborhood rebirth. Community leaders and the City have worked on a project to "Rezone Indy" in connection with this district and plans for the area include park and greenways improvements, brownfield remediation, and new development along the Monon Trail.
16 Tech: The boundaries of this area extend from Fall Creek on the east, White River on the south and west and 21st Street on the north. The 16 Tech Downtown Technology Park is a certified technology park designation given by the State of Indiana to redevelop an area into a high tech, biosciences and innovation hub. The goal is to create high paying jobs in support of nearby life science centers such as IU School of Medicine, IUPUI, Eskanazi Hospital and Eli Lilly. Current projects include the redevelopment of historic Bush Stadium into market rate loft apartments, new student housing and a new Pre-K – 8 charter school at 18th & Riverside Drive.

Holy Cross Neighborhood: This neighborhood extends from East Washington north to East Michigan from the interstate on the west to State Avenue on the east. New investment in the area includes high end single family housing, a microbrewery and production facility for a popular deli. The neighborhood's close proximity to downtown Indy makes it attractive and desirable to families.

GM Stamping: On the near west side of downtown Indy, the GM Stamping Plant is a large 100+ acre site along the White River. Overlooking downtown, the site is desirable to developers looking to build multi-family housing, office and retail along the waterway. The City is working with Racer Trust, the owner of the site, to ensure it gets redeveloped as a mixed use downtown destination.

Central State: This 160-acre site is owned by the City of Indianapolis and is located 1 ½ miles west of downtown Indy along West Washington Street. Current development includes a multi-family apartment complex with 144 units, 62 unit senior apartment complex with senior community center, K-12 charter school and soon-to-come student dormitory housing, office space and an event center.

Historic Irvington: Located 2 miles east of downtown Indy, Irvington's downtown is thriving with new retail and restaurant options as well as a beautiful streetscape along Washington Street. The housing stock is older homes with character that continue to be popular among families.

Ford Visteon: This is a 150 acre site located on the City's southeast side that was formerly the Ford truck drive shaft plant. The City's interest is to replace the plant with more industrial jobs.

Super Bowl Legacy Project: Part of the NFL's requirements for hosting a Super Bowl is for a city to develop a plan to spur redevelopment of a blighted area. The near east side was selected to be the recipient of public, private and philanthropic funding to rehab and build about 300 housing units, construct an indoor training facility at Arsenal Tech High school and new community center to serve the area. The multi-million effort improved a stretch of 10th Street and created new housing options for families.

Riverside Neighborhood: The City is contemplating using the Riverside neighborhood in its next bid for another Super Bowl. Riverside extends from 18th Street on the south to 30th Street to the north; White River on the west to Fall Creek to the east. Riverside abuts the 16 Tech Downtown Technology Park and will be home to a brand new Pre K–8 charter school in August 2014. Riverside also has a large urban park with outdoor pool, community center, workout gym, basketball courts and golf course.

Mapleton-Fall Creek: This area runs along Fall Creek Parkway north of downtown Indy around the 2200 block. Houses are older with character, but many are blighted and boarded up. There are very few retail options, but the neighborhood has a strong economic development presence.

Midtown/Broad Ripple/38th & Illinois: Midtown is a strong contingent of neighborhoods and leaders in support of redevelopment and new development from Fall Creek Parkway all the way north to Broad Ripple. Its redevelopment plan calls for new multi-family housing, a massive park redevelopment, new retail and mixed use in several nodes throughout the district. This area is widely varied in terms of income.

Mass Ave: Mass Ave is one Indy's hottest neighborhoods for urban housing because of its strong retail and restaurant presence, as well as being a hub for arts and culture. Several multi-family projects are being considered for development.

Gateway South: This area runs southeast along Madison Avenue all the way to Southport from downtown Indy. Once an industrial corridor, neighborhood leaders hope to get a TIF district designation to spur new office, housing and retail development.

APPENDIX C

The below references from Indiana code relate what types of transportation can be provided and other specifics to the requirements for student transportation.

IC 20-27-2-8 "School bus"
Sec. 8. "School bus" means a motor vehicle, other than a special purpose bus, that is:

(1) designed and constructed for the accommodation of more than ten (10) passengers; and

(2) used for the transportation of Indiana students.

The term includes the chassis or the body, or both.

IC 20-27-5-2 Authority to provide transportation
Sec. 2. (a) The governing body of a school corporation may provide transportation for students to and from school.
(b) If the governing body of a school corporation:

(1) provides transportation; or

(2) contracts with an educational service center (as defined by IC 20-20-1-2) to provide transportation;

no fee may be charged to a parent or student for transportation to and from school. However, a fee may be charged for transportation to and from an athletic, a social, or another school sponsored function.

IC 20-27-5-3 Transportation responsibilities
Sec. 3. If a school corporation provides transportation for students, the governing body of the school corporation is responsible for obtaining the necessary school buses and school bus drivers.

IC 20-27-9-1 Generally
Sec. 1. (a) This section does not apply to the use of school buses owned and operated by:

(1) a nonpublic school; or

(2) a nonprofit agency with primary responsibility for the habilitation or rehabilitation of developmentally or physically disabled individuals.

(b) Except as provided under sections 2 through 15 of this chapter, a person may not operate or permit the operation of a school bus on a highway in Indiana for a private purpose or a purpose other than transportation of eligible students to and from school.

IC 20-27-9-3 School and other activities
Sec. 3. (a) The governing body of a school corporation may allow, by written authorization, the use of a school bus for transportation of eligible students and necessary adult chaperones or of adults to and from an activity that is sponsored, controlled, supervised, or participated in by the governing body. The number and qualifications of adult chaperones under this section may be determined by the governing body.

(b) The governing body may allow, by written authorization, the use of a school bus for transportation of students and necessary adult chaperones to and from an educational or recreational activity approved or sponsored by a political subdivision if:

(1) the transportation originates from a place within the geographical limits of the school corporation served by the affected bus;

(2) the persons transported are Indiana residents; and

(3) the trip does not involve more than two hundred (200) miles of travel out of state.

IC 20-27-9-4 Transportation; chaperones
Sec. 4. (a) The governing body of a school corporation may, by written authorization, allow the use of a school bus for transportation:

(1) of preschool children who attend preschool offered by the school corporation or under a contract entered into by the school corporation to and from the preschool facility site; and

(2) subject to the geographic and residency requirements set forth in section 3(b) of this chapter, of preschool children and necessary adult chaperones to and from an educational or recreational activity approved or sponsored by the governing body for the preschool children.

(b) The number and qualifications of adult chaperones under subsection (a)(2) may be determined by the governing body.

IC 20-27-9-5 Use of special purpose bus
Sec. 5. (a) A special purpose bus may be used:

(1) by a school corporation to provide regular transportation of a student between one (1) school and another school but not between the student's residence and the school;

(2) to transport students and their supervisors, including coaches, managers, and sponsors to athletic or other extracurricular school activities and field trips;

(3) by a school corporation to provide transportation between an individual's residence and the school for an individual enrolled in a special program for the habilitation or rehabilitation of persons with a developmental or physical disability; and

4) to transport homeless students under IC 20-27-12.

(b) The mileage limitation of section 3 of this chapter does not apply to special purpose buses.

(c) The operator of a special purpose bus must be at least twenty-one (21) years of age, be authorized by the school corporation, and meet the following requirements:

(1) If the special purpose bus has a capacity of less than sixteen (16) passengers, the operator must hold a valid:

(A) operator's;

(B) chauffeur's;

C) public passenger chauffeur's; or

(D) commercial driver's; license.

2) If the special purpose bus has a capacity of more than fifteen (15) passengers, the operator must meet the requirements for a school bus driver set out in IC 20-27-8.

(d) A special purpose bus is not required to be constructed, equipped, or painted as specified for school buses under this article or by the rules of the committee.

(e) An owner or operator of a special purpose bus, other than a special purpose bus owned or operated by a school corporation or a nonpublic school, is subject to IC 8-2.1. 19

IC 20-27-9-6 Groups and organizations
Sec. 6. (a) In addition to the exemptions granted in this chapter and notwithstanding section 16 of this chapter, a school corporation may allow a school bus operated under a fleet or transportation contract and not owned in whole or in part by a public agency to be used for the transportation of a group or an organization for any distance, if that group or

organization agrees to maintain the condition of the school bus and to maintain order on the school bus while in use.

(b) When authorizing transportation described in subsection (a), the school corporation shall require the owner of the school bus to:

   (1) obtain written authorization of the superintendent of the contracting school corporation;

   (2) clearly identify the school bus with the name of the sponsoring group; and

   (3) provide proof to the superintendent and the sponsoring group of financial responsibility, as required by IC 9-25 and IC 20-27-5-9 for the transportation.

(c) The governing body of a school corporation may allow, by written authorization, the use of a school bus owned in whole or in part by the school corporation for the transportation needs of a fair or festival operated by or affiliated with a nonprofit organization exempt from federal taxation under Section 501(c)(3) through 501(c)(7) of the Internal Revenue Code.

IC 20-27-9-7 Developmentally disabled persons
Sec. 7. (a) As used in this section, "developmentally disabled person" means a person who has a developmental disability (as defined in IC 12-7-2-61).

(b) A special education cooperative operating under IC 36-1-7, IC 20-35-5, or IC 20-26-10 or a school corporation may enter into an agreement with a state supported agency serving developmentally disabled persons in which a school bus or special purpose bus used by the special education cooperative or school corporation may be used to transport developmentally disabled persons who:

   (1) are at least two (2) years of age; and

   (2) live within the boundaries of the special education cooperative or school corporation;

to and from programs for the developmentally disabled.

(c) An increased cost of transportation for developmentally disabled persons not reimbursed under IC 21-3-3.1 shall be borne by the persons transported or the state supported agency serving the developmentally disabled. However, a developmentally disabled person may not be required to pay for transportation provided under this section if the required payment is contrary to law.

IC 20-27-9-11 Day care centers; developmentally and physically disabled persons
Sec. 11. (a) As used in this section, "day care center" means an institution operated primarily for the purpose of providing:

   (1) care;

   (2) maintenance; or

   (3) supervision and instruction;

to children who are less than six (6) years of age and are separated from their parent for more than four (4) hours but less than twenty-four (24) hours a day for at least ten (10) consecutive workdays.

(b) A:

   (1) day care center; or

   (2) nonprofit agency with primary responsibility for the habilitation or rehabilitation of developmentally disabled or physically disabled persons;

may own, operate, lease, or contract for a school bus that meets the color, equipment, and other requirements of the committee.

(c) The school bus must be used only for the purpose of transporting:

(1) persons in the care of the day care center or agency; and

(2) supervisors of those persons;

to and from educational, social, recreational, or occupational functions.

(d) If an entity described in subsection (b) acquires:

(1) a school bus; or

(2) the use of a school bus;

authorized under subsection (b), each driver of the school bus authorized by the entity must comply with the requirements imposed upon persons transporting students under IC 20-27-8 in order to be certified by the department as a school bus driver.

IC 20-27-9-12 Child care center
Sec. 12. (a) As used in this section, "child care center" means a nonresidential building where at least one (1) child receives child care from a provider licensed under IC 12-17.2-4:

(1) while unattended by a parent;

(2) for regular compensation; and

(3) for more than four (4) hours but less than twenty-four (24) hours in each of ten (10) consecutive days per year, excluding intervening Saturdays, Sundays, and holidays.

(b) This subsection does not apply to a developmentally disabled or physically disabled person who is provided transportation by a school corporation by means of a special purpose bus as provided in section 5(a)(3) of this chapter. An individual or entity who transports children in the care of a:

(1) preschool operated by a school corporation;

(2) public elementary school; or

(3) public secondary school;

on a public highway (as defined in IC 9-25-2-4) within or outside Indiana shall transport the children only in a school bus. However, a special purpose bus may be used for transportation of the children to activities other than regular transportation between the residences of the children and the school.

(c) An individual or entity that transports children in the care of a child care center on a public highway (as defined in IC 9-25-2-4) within or outside Indiana in a vehicle designed and constructed for the accommodation of more than ten (10) passengers shall transport the children only in a school bus or special purpose bus.

(d) The operator of a:

(1) school bus that transports children as required under subsection (b) or (c) must meet the requirements of IC 20-27-8; and

(2) special purpose bus that transports children as required under subsection (b) or (c) must meet the requirements of section 5(c) of this chapter.

(e) This section does not prohibit the use of a public transportation system for the transportation of children if the motor carriage used is designed to carry at least twenty (20) passengers.

(f) This section does not prohibit a:

(1) preschool operated by a school corporation;

(2) public elementary school;

(3) public secondary school; or

(4) child care center;

from contracting with a common carrier for incidental charter bus service for nonregular transportation if the carrier and the carrier's motor coach comply with the Federal Motor Carrier Safety Regulations as prescribed by the United States Department of Transportation Federal Highway Administration.

(g) Notwithstanding section 17 of this chapter, a person who violates this section commits a Class B infraction. 21

IC 20-27-10-2 Discipline on school bus
Sec. 2. When students are being transported on a school bus, the students are under the supervision, direction, and control of the school bus driver and are subject to disciplinary measures by the school bus driver and the governing body of the school corporation.

IC 20-27-10-3 Capacity of school bus
Sec. 3. A governing body may not require a school bus driver to transport students for whom a regular seat is not available in the school bus.

IC 20-27-11-1 Transportation cost; nonpublic school student
Sec. 1. (a) If a student who attends a nonpublic school in a school corporation resides on or along the highway constituting the regular route of a public school bus, the governing body of the school corporation shall provide transportation for the nonpublic school student on the school bus.

(b) The transportation provided under this section must be from the home of the nonpublic school student or from a point on the regular route nearest or most easily accessible to the home of the nonpublic school student to and from the nonpublic school or to 22

and from the point on the regular route that is nearest or most easily accessible to the nonpublic school from which the student can walk to and from the nonpublic school.

IC 20-27-11-2 Transportation cost; student living on state owned property
Sec. 2. (a) Except as provided in subsection (b), a student who resides on state owned property and attends a public school away from the student's residence shall be furnished transportation in a public school bus to and from the student's residence and the public school the student attends. Expenses for the transportation shall be paid out of the state general fund, without further appropriation, on allowance by the state superintendent.

(b) This section does not apply to students who reside on property owned by Indiana University, Purdue University, Ball State University, or Indiana State University.

IC 20-27-11-3 Transportation cost; high school student
Sec. 3. (a) If a school corporation does not maintain or operate a high school and a high school student who resides in the school corporation is transferred to attend a high school in a contiguous school corporation, the governing bodies of the school corporations may enter into an agreement for the transportation of the student.

(b) The agreement under subsection (a) must specify that the transportation shall be provided by the receiving school corporation and that the costs of transportation shall be paid by the transferring school corporation out of the school corporation's special school funds. The costs of transportation shall be calculated from the per capita cost for each student transported and shall be mutually agreed upon by both governing bodies. Payment of transportation charges shall be made at the same time and in the same manner as payments of transfer tuition are made for transferred students.

IC 20-27-11-4 Transportation cost; contracts
Sec. 4. The governing body of a school corporation that transfers a student to another school corporation may contract with the receiving corporation for the provision of transportation costs for the transferred student.

IC 20-27-12-4 Transportation of homeless student to school of origin; between school corporations; shared responsibility
Sec. 4. (a) If a homeless student temporarily stays in the homeless student's original school corporation but outside the attendance area for the school of origin, the original school corporation shall provide transportation for the homeless student from the place where the homeless student is temporarily staying to the school of origin.

(b) If:

   (1) a homeless student's school of origin is located in a school corporation in which the homeless student does not temporarily stay; and

   (2) the homeless student does not elect to attend a school located in the school corporation in which the homeless student is temporarily staying; the original school corporation and the transitional school corporation shall enter into an agreement concerning the responsibility for and apportionment of the costs of transporting the homeless student to the school of origin.

(c) If the original school corporation and the transitional school corporation are unable to reach an agreement under subsection (b), the responsibility for transporting the homeless student to the school of origin is shared equally between both school corporations, and the cost of transporting the homeless student to the school of origin is apportioned equally between both school corporations.

IC 20-27-13-1 "Eligible student"
Sec. 1. As used in this chapter, "eligible student" means an individual who in any part of a school year:

   (1) is enrolled in a school corporation;

   (2) has legal settlement in the school corporation;

   (3) attended school in the school corporation's taxing district; and

   (4) is not required by federal or state law to receive transportation services to and from school.

IC 20-27-13-2 Applicability
Sec. 2. This chapter applies to a school corporation that carried out a general program in at least one (1) school year beginning after June 30, 2010, to provide transportation to and from school for eligible students.

IC 20-27-13-3 Program to provide transportation required under certain circumstances
Sec. 3. Except as provided in section 7 of this chapter, a school corporation described in section 2 of this chapter shall carry out a program to provide transportation to and from school for all eligible students in any part of a school year beginning after June 30, 2012, unless the governing body of the school corporation:

   (1) approves the termination of the transportation program; and

   (2) provides public notice of the date after which the transportation will no longer be provided under the transportation program;

at least three (3) years before the date after which the transportation will no longer be provided under the transportation program.

IC 20-27-13-5 Transportation to and from school
Sec. 5. Transportation provided under a transportation program required under section 3 of this chapter may be limited by the school corporation's governing body to providing transportation to school immediately before the beginning of an instructional day (as described in IC 20-30-2-2) and from school immediately after the end of an instructional day (as described in IC 20-30-2-2) without additional accommodations for participation in extracurricular activities.

IC 20-27-13-7 Petition for waiver
Sec. 7. (a) A school corporation may petition the department in writing to waive the requirement imposed by section 3 of this chapter.

(b) A petition under subsection (a) must:

(1) demonstrate that the waiver request was approved by the governing body for the school corporation;

(2) describe the transportation services that will be provided to students who are required by federal or state law to receive transportation services to and from school;

(3) present a written plan that provides for the safe movement of eligible students to and from school; and

(4) include any other information required by the department.

IC 20-50-3-5 Transportation of students in foster care
Sec. 5. (a) If a student in foster care temporarily stays in the student's original school corporation but outside the attendance area of the student's school of origin, the original school corporation shall provide transportation for the student from the place where the student is temporarily staying to the school of origin and from the school of origin to the place where the student is temporarily staying.

(b) If:

(1) the school of origin of a student in foster care is located in a school corporation other than the school corporation in which the student is temporarily staying;

(2) the school of origin is located in a school corporation that adjoins the school corporation in which the student is temporarily staying; and

(3) the student does not elect to attend a school located in the school corporation in which the student in foster care is temporarily staying; the original school corporation and the transitional school corporation shall enter into an agreement concerning the responsibility for and apportionment of the costs of transporting the student to and from the school of origin.

(c) If the original school corporation and the transitional school corporation described in subsection (b) are unable to reach an agreement under subsection (b), the responsibility for transporting the student in foster care to and from the school of origin is shared equally between both school corporations, and the cost of transporting the student to and from the school of origin is apportioned equally between both school corporations.

IC 9-21-12-12 School bus loading and unloading on highway
Sec. 12. When a school bus is operated on a highway, the driver shall load and unload a student as close as practical to the right-hand curb or edge of the roadway.

IC 9-21-12-13 School bus; arm signal device
Sec. 13. (a) Except:

(1) as provided in subsection (b); or

(2) when a school bus is stopped at an intersection or another place where traffic is controlled by a traffic control

device or a police officer; whenever a school bus is stopped on a roadway to load or unload a student, the driver shall use an arm signal device, which must be extended while the bus is stopped.

(b) The governing body of a public school may authorize a school bus driver to load or unload a student at a location off the roadway that the governing body designates as a special school bus loading area. The driver is not required to extend the arm signal device when loading or unloading a student in the designated area.

APPENDIX D: IPS INFORMATION TECHNOLOGY SERVICES MATRIX

The IPS IT Department provides multiple services across all areas of IPS. At the highest level, the key types of services are: Application/Systems Development and Support, Infrastructure Services, Systems Hosting, Information Storage, Workstation/PC Deployment & Support, Training and Network Connectivity.

See the below matrix for an overview:

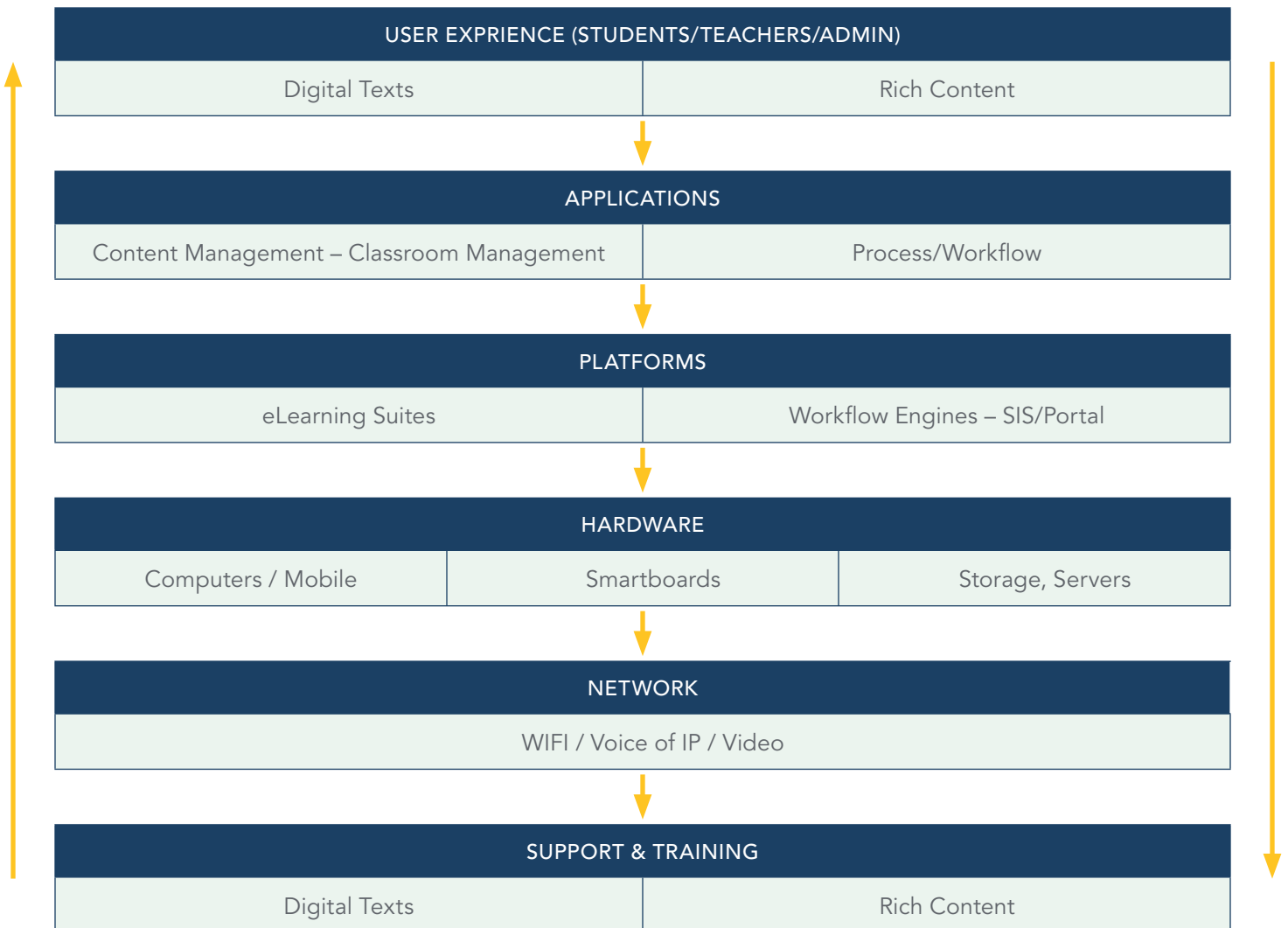|	ADMINISTRATION								SCHOOLS			
Functions → / IT Services ↓	School Board	Superintendent	School and Community Relations	Human Resources	Financial and Business Systems	Office of District Operations	Office of Student Assignment	Information Technology	Curriculum & Instructional Technology	Instructional Technology	Title	Professional Development
Departments / Groups	Board Members	Core Leadership Team	Web & Social Media	Sub Teachers Office	Budget	Facilities	Magnet & Options	Administative Systems	Adult Ed	Computer Specialists	Pre School	
			Public Relations	Benefits	Purchasing	Food Service	Adjudicator	IT Operations	Alt Ed	Media Services	Non Public Programs	
			Switchboard	FMLA	Payroll	Transportation		IT Service Desk	Athletics	Library		
			IPS Television	Compensation	Accounting	School Police		Systems Operations	Elem Ed			
				Contracts	Warehouse	Planning		Network Operations	ESL			
				Salaries	Grant Accounting	Fixed Assets		Field Support	SPED			
								Data Entry	Sec Ed			
								Payroll Processing	JROTC			
								Transportation Systems	REA			
									Virtual School			
									Elementary School			
									Middle Schools			
									Community Schools			
									High Schools			
									Alternative Schools			
									Magnet Schools			
IT PROJECTS												
SYSTEM SUPPORT												
CUSTOM REPORTING												
SERVERS / STORAGE												
WORKSTATIONS												
TRAINING												
INTERNET												
TELECOM												

APPENDIX E: IPS INFORMATION TECHNOLOGY APPLICATION INVENTORY MATRIX

The support and maintenance for the IT applications and systems that enable the business functions is a major part of the IT budget. The Application inventory the IT support is extensive. The follow matrix highlights the applications that IT supports aligned by the business functions it enables:

IT Services	Functions →	ADMINISTRATION								SCHOOLS			
		School Board	Superintendent	School and Community Relations	Human Resources	Financial and Business Systems	Office of District Operations	Office of Student Assignment	Information Technology	Curriculum & Instructional Technology	Instructional Technology	Title	Professional Development
IT PROJECTS													
SYSTEM SUPPORT													
Communication	Blackboard Connect	←							→				
	IPS Online	←							→				
			SIS (eSchool Plus)							SIS (eSchool Plus)			
	eGovernance (Board Docs)	←							→				
	Staff & Parent Communications	←							→				
	SharePoint	←							→				
	Messaging (GW Messenger)	←							→				
											Google Docs		
Financial	ERP (Munis)	←							→				
	Payroll Data Entry	←							→				
	Payroll Processing	←							→				
						Transportation Payroll				Transportation Payroll			
	E-Rate Management	←							→				
	Energy Management						Energy Management						
							CPA			CPA			
Operations	SchoolDude (Service Tickets)	←							→				
	Fixed Assets	←							→				
	Smart Phones	←							→				
					Teacher Contracts					Teacher Contracts			
			United Way				United Way		United Way				
Reporting	DOE Reports						DOE Reports			DOE Reports			
	Vendor Reporting					Vendor Reporting						Vendor Reporting	
	Docufide									Docufide			
	Document Locator				Document Locator				Document Locator				
	Data Warehouse	Data Warehouse				Data Warehouse				Data Warehouse			
Safety	School Police Dispatch						School Police Dispatch						
	School Police Incident Rptg.						School Police Incident Rptg.						
Transportation	Bus Routing (Edulog)						← →						
	Bus Stop Lookup						← →						
	Geocodes						← →						
	LivePerson Chat			LivePerson Chat			LivePerson Chat			LivePerson Chat			
	Fuel System		Fuel System			Fuel System				Fuel System			Fuel System
	Field Trips		Field Trips				Field Trips			Field Trips			
	GPS Vehicle Tracking						GPS Vehicle Tracking						
	Traps Inquiry System						Traps Inquiry System			Traps Inquiry System			
Assessments	ISTEP+		ISTEP+					ISTEP+		ISTEP+			
	Acuity									Acuity			
	ACT/Compass									ACT/Compass			
	mClass, Dibels									mClass, Dibels			
	ECA									ECA			
	iRead									iRead			
	SRI									SRI			
	Assessments									Assessments			
Educational Tools	Textbook Mgmnt.					Textbook Mgmnt.				Textbook Mgmnt.			
	Textbook Rental					Textbook Rental				Textbook Rental			
	Library					Library				Library			
	Destiny					Destiny				Destiny			
	Read 180									Read 180			
	Accelerated Reader									Accelerated Reader			
	Wonders									Wonders			
	Superkids									Superkids			
	ALS									ALS			
	Edgenuity									Edgenuity			
	DyKnow									DyKnow			
	StudentFitness (DineIn)									StudentFitness (DineIn)			
	FitnessGram									FitnessGram			
	Learning Management System (Angel)	←								→			
	Discipline Admin.		Discipline Admin.					Discipline Admin.		Discipline Admin.			
	Video Conf. (ENA)			Video Conf. (ENA)						Video Conferencing (ENA)			
	Classroom AV							Classroom AV		Classroom AV			
	Virtual Desktops (Vmware View)	←								→			
CUSTOM REPORTING													
SERVERS / STORAGE													
WORKSTATIONS													
TRAINING													
INTERNET													
TELECOM													

APPENDIX F: TECHNOLOGY ROADMAP COMPONENTS

It is critical at this juncture to pull together a technology plan that leverages the best tools as it relates to the content deliver, Learning Management, Infrastructure strategies and workflow engines.

USER EXPRIENCE (STUDENTS/TEACHERS/ADMIN)	
Digital Texts	Rich Content

APPLICATIONS	
Content Management – Classroom Management	Process/Workflow

PLATFORMS	
eLearning Suites	Workflow Engines – SIS/Portal

HARDWARE		
Computers / Mobile	Smartboards	Storage, Servers

NETWORK
WIFI / Voice of IP / Video

SUPPORT & TRAINING	
Digital Texts	Rich Content

The follow matrix highlights the Infrastructure Services that enable the applications and business operations, as well as the volume of devices supported throughout the district:

				ADMINISTRATION					SCHOOLS			
Functions → / IT Services ↓	School Board	Superintendent	School and Community Relations	Human Resources	Financial and Business Systems	Office of District Operations	Office of Student Assignment	Information Technology	Curriculum & Instructional Technology	Instructional Technology	Title	Professional Development
IT PROJECTS												
SYSTEM SUPPORT												
CUSTOM REPORTING												
SERVERS / STORAGE												
Sharing	Home Directories											
	Departmental Shares											
	Network Drives											
Email	eMail (GroupWise)											
	E-Mail (Retain)											
Platform	Portal System (StoneWare)											
	Data Backup and Restore (Tivoli)											
	Virtual Servers (Vmware)											
	Web Server Services											
Security	AntiVirus (Sophos)											
	Active Directory											
	SPAM Filter (Baracuda)											
	Group Policy Object Management											
	CIPA Filter (ENA)											
	Security Services											
WORKSTATIONS												
Support	Help Desk Services											
	Remoted Desktop Support											
	Imaging Services (FOG, Deploy Studio)											
	Application Delivery (FileWave)											
	Network Printers											
Desktops	9	5	7	75	37	396	14	383	7,054	113	1,697	
Laptops	5	3	3	3	18	218	1	4,801	14,740	250	7,258	1
Tablets					1	30		105	2,208	7	975	
Printers	2	5	4	12	33	261	17	138	4,853	62	526	5
Carts									2	230	3	257
TRAINING												
INTERNET												
Web	Education Networks of America											
	IPS Website											
	eMail, (GroupWise, Messenger, Retain)											
TELECOM												
WAN/LAN	AT&T, Private Fiber, Brighthouse, Cisco, HP, Juniper											
	DNS											
	DHCP											
	Network Monitoring (Solar Winds)											
Voice	Telephone (Voice)											
	Voicemail											

APPENDIX H: IPS IT ACTIVITIES TO-DATE FOR COST OPTIMIZATION

Most studies define efficiency as the maximum performance for any given level of resources. The general definition of effectiveness is the ability to achieve stated education goals. The need to link the analysis of effectiveness to expenditures is a major focus of IPS, and reducing IT-related expenditures are a key goal of the Information Technology Department.

Current IT-related expenditures can be classified within one of three spending categories: Instruction, instructional support and non-instruction. The goal of the Information Technology Department has been to reduce spending in the non-instruction areas. Here are a few examples of IT actions to obtain better efficiencies:

a) Virtualization

   Virtualization software allows one physical server to run several individual computing environments. It is employed at a local level. Allows for multiple servers for each physical server purchased, i.e., IPS can purchase and maintain fewer servers, and get more use out of the servers it already has. A virtualized server makes better use of the server's available capacity than a non-virtualized server, and can run more applications on each virtualized server. This also protects all our virtualized applications; should a node or server ever fail, all virtual machines are automatically restarted on another machine, with no downtime or data loss. In addition to the server virtualization, end user desktop virtualization has also been deployed. This allows central control of the available desktop solutions much more efficiently and allows for quick change-over depending on need. As an example:

   • When online testing is underway, computer labs can be reset to offer desktops that only allow the testing application, and lock out everything else.

   Support time is also decreased by reducing the frequent patching, maintenance and I/O bottlenecks of other platforms. All of this net result in lower costs, higher reliability and increased performance.

   • Virtualization with Office, VDA, and now EES $400,000 in 2014.
   • Thin client labs reduce significantly the costs associated with hardware and support.
   • Implemented POE Thin Client technology in elementary labs to reduce wiring costs.

b) Cloud Computing:

   Cloud computing is an umbrella term that encompasses virtualization. It is accessed as a service. This gives our users access to complex applications and massive computing resources via the Internet, eliminating the need to install client-specific software on each user's machine. It offers easier installation of applications and hardware, and allows the ability to try software before purchasing it. Examples include:

   • Within specific privacy parameters, enabling cloud services Google Docs and Office 365 with EES Agreement.

c) Project Management Guide and Leadership:

   The IT Project Management Practices Guide (Guide) contains a repeatable, institution-wide approach for the management of application development and/or software procurement and deployment projects. These project management (PM) practices are transferable to other types of projects (beyond IT) that would benefit from project management. Although this guide is still in the development stage, IT has already put into practice many of its activities within its responsibilities, as well as in support of various District initiatives. Project Management leadership provides:

   • Better Efficiency in Delivering Services: Project management provides a "roadmap" that is easily followed and leads to project completion.
   • Improved / Increased / Enhanced Customer Satisfaction: Best enables a project to be done on time and under budget.

- Improved Growth and Development within IT and District teams: Positive results not only command respect, but more often than not inspire teams to continue to look for ways to perform more efficiently.

- Better Flexibility: Allows for, and many times requires, the consideration of alternatives to success based upon differences in resource requirements and availability.

- Increased Risk Assessment: provides a "red flag" when critical factors affecting successful completion have arisen.

- Enhanced Effectiveness in Delivering Services: Successful strategies are formally documented and therefore available to reference for future projects.

- Increase in Quality: Goes hand-in-hand with enhanced effectiveness.

- Increase in Quantity: Increase in quality is often the result of better efficiency,

- By implementing fundamental project management strategies, the District can better narrow its focus, reach desired goals and achieve those goals within specific time and cost perimeters.

d) Additional Cost Savings and Capability Improvement Actions:
- Exploring a Linux OS on 1500 repurposed laptops to use in the classroom.

- Exploring Open Office, Google Docs and Office 365 as a replacement for the current Microsoft Office license that is purchased with each system.

- Replacing CCTV and AAVS (Distance Learning) with a video conferencing solution, net savings of over $150,000 per year.

- In addition to the permanent testing labs, we create, biannually, temporary testing sites to support 2250 testing laptops.

- Outsourced new acquisition installation and inventory tagging in order to reduce staffing

- Update of anti-virus product.

- Security improvements for staff, students and guardians.

- Integrating Student Information Systems to other systems through automation.

- Update the Mac OSX to the latest version if hardware is capable.

- Update FileWave for both Mac OSX and IOS devices.

- Increase the integration into Google Docs and Office 365 for educational purpose.

- Upgrade the Learning Management System.

- Increase the utilization and upgrade of our SharePoint environment.

- Outside security audit on systems.

- Microsoft and Linux Server OS Upgrades as well as backend applications (SQL, Windows 2012, SharePoint 2013).

- We currently have a Request for Proposal underway for our Metropolitan Area Network. Our goal is to negotiate a contract with a service provider to enable faster, more robust connectivity to the schools and at the same time, save cost.

  The IT Department has additional activities underway for better efficiencies and capability Improvement. Here are some examples of how IT is attacking, within their control, technology inequities and recommendations for the District to better achieve equity:

- We are currently working with Facilities and the Education Foundation to upgrade all remaining buildings to have classroom AV systems and building-wide wireless connectivity.