

Performance Audit Progress Tracking Spreadsheet

Recommendation	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Person Responsible	Evergreen Five Year Savings Estimate	TPS Five Year Savings Estimate	Evergreen Five Year Cost Estimate	TPS Five Year Cost Estimate	Explanation of Variance in Projected vs Actual Costs	Comments	Proximity to Classroom	Priority (1-4)
Performance Audit	07/01/13	06/30/18											
CHAPTER 2: DISTRICT ORGANIZATION AND MANAGEMENT													
2-1 Use team building sessions to create a level of trust and understanding among Board members and with the administration.	07/01/13	02/01/14	In Progress	Complete/Ongoing	Superintendent/Retreat(s)	\$0	\$0	\$0	\$0		There have been two board retreats in the 2014-2015 school year. One in which the Superintendents cabinet attended with a presenter from OSBA. One of the discussion items were Board and administrative relationships. In future board retreats, team building sessions will occur.	4	3
2-2 Adopt Protocols of Professional Conduct to ensure that Board members govern in a dignified and professional manner, treating everyone with civility and respect.	10/01/13	02/01/14	05/01/14	09/23/14	Superintendent/Policy Committee	\$0	\$0	\$0	\$0		SMART goals have been developed by the board president. Additionally, a board handbook is in the process of development.	4	3
2-3 Curtail micromanagement and special staff assignments by School Board members of the Superintendent and staff.	02/01/14	02/01/14	03/15/14	Complete, 3/15/2014	Superintendent/Board Retreat(s)	\$0	\$0	\$0	\$0		There have been two board retreats in the 2014-2015 school year. One in which the Superintendents cabinet attended with a presenter from OSBA. One of the discussion items were Board and administrative relationships and micromanagement was defined for all parties to understand for future communication. The Superintendent and Board have communicated on the expectations as it relates to board member requests. SMART goal has been established as well. Board President meets weekly with the Superintendent and the Treasurer to address concerns/issues. Complete.	4	3
2-4 Revise the board agenda so that it includes a consent agenda, information items, and action items.	09/01/14	09/01/14	06/01/14	Complete, June 2014	Murphy/Policy Committee	\$0	\$0	\$0	\$0		June, 2014 board meeting will include a consent agenda.	4	4
2-5 Create and implement a form for use with each agenda item which requires action by the TPS School Board.	09/01/14	09/01/14	NA	Complete	Murphy/Policy Committee	\$0	\$0	\$0	\$0		After review of consent agenda practices, it was determined this form would not be used. However, the district will re-visit the process for potential changes. However, a list of discussion items will be included for every board meeting. This list is separate from the consent agenda.	4	4
2-6 Implement a yearly School Board self-evaluation using the instrument contained in the TPS Policy Manual.	07/01/14	07/01/14	02/15/14	Complete, 2/15/2014	Superintendent/Policy Committee	\$0	\$0	\$0	\$0		This form exists in district policy and will be used in the future as discussed in the board retreat. Complete	4	3
2-7 Develop a comprehensive Administrative Procedures Manual that contains administrative procedures, and which can be used by school and central office administrators to ensure consistency among staff.		10/01/15	10/01/13		Murphy/Policy Committee	\$0	\$0	\$0	\$25,000	The district will need to allocate resources to assist in the facilitation and development of the administrative procedures manual.	Research on cost and provider's currently underway. RFP may be issued. There is a cost of approximately \$25,000 plus internal resources cost. This item will most likely be delayed until at least the 2015-16 school year based on many other current initiatives. The district may include this item in the strategic plan which is in the development stages and facilitated by Battelle for Kids. In the meantime, district divisions are deve	3	1
2-8 Restructure the central office of Toledo Public Schools.	04/01/14	09/01/15	08/01/14	In Progress	Cabinet/Curriculum Committee	\$0	\$0	(\$100,000)	\$0	The district restructured central administration with TAAP administrative positions only. The restructure was a \$20,000 dollar a year reduction based on the evergreen projection.	Restructure has happened through realignment of divisions and positions through computer services, student data, and curriculum. Additional restructure will be reviewed in the curriculum division. Restructuring in the curriculum division requires negotiations.	3	2
2-9 Implement an accountability tracking system for the Superintendent's Cabinet.	08/01/13	08/01/13	08/01/13	Complete, 8/31/2013	Jordan	\$0	\$0	\$0	\$0		Document developed and currently in use. Complete	3	3
2-10 Improve teacher relations with the administration by creating a Teacher Advisory Council.	09/01/14	01/01/15			Cabinet/Curriculum Committee	\$0	\$0	\$0	\$0		The district has held two (2) teacher appreciation lunches. The first had over 500 staff attend. The second which was in August, 2014 had over 2,000 staff members attend. The district has approximately 3,700 employees. Dr. Durant and Transformational leaders visit school several times weekly to visit classrooms as a support piece	2	1
2-11 Ensure that Ombudsman is held accountable for completing duties contained in his contract.	08/01/13	09/01/13	08/01/13	Complete, 9/1/2013	Irving/CPR Committee	\$0	\$0	\$0	\$0		The Ombudsman meets regularly with the Transformational Leader of Public Relations regarding the progress of action items related to the duties and responsibilities of the position. Complete	3	4

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2-12 Implement the TAAP contract at the elementary level, modify the TAAP contract for school administrators at the secondary level to correlate with student enrollment, and eliminate a minimum of 15 assistant principal positions in Toledo Public Schools.					Cabinet/Human Resources Committee	\$6,393,750	\$0	\$0	\$0		Reducing administrative staff while implementing state mandates which has increased the elementary principal/assistant principal job responsibilities. Some of the extra responsibilities include: Teacher based team meetings weekly which includes planning and paperwork to the district leadership team. Reduction of nurses in the district, reduction of secretaries in the district. RtT, SIG, and priority school grant requirements which includes additional meetings and requirements. Sungard student data system for data based decision making. STAR assessments. Implementation of the values and action plans to meet the mission/vision of the district. Core values include: Accountability based.		2 4
2-13 Implement consistent clerical staffing at the elementary level, modify the union contract for clerical staffing at the secondary level to reduce clerical support to 4 or 5 positions (based on student enrollment), and reduce clerical staff by a minimum of 2.4 positions at the elementary level and six positions at the high school level.					Cabinet/Human Resources Committee	\$2,058,000	\$0	\$0	\$0		Increased expectations for data reporting which impacts funding for the district. Current clerical staff at the high schools struggle to maintain current workload. The district has a very mobile population which means the number of student entry and withdrawals are much high the most districts. In addition, the district has over 10,000 students in charter schools which requires additional tracking and correspondence with charter schools and the state regarding all students in charters. The tracking is important for funding purposes as the data in the state system impacts district funding. The district pays out approximately 60 million to charter schools annually.		2 4
2-14 Create a Strategic Planning Committee consisting of TPS Board members, administrators, teachers, parents, City government leaders, and community leaders to augment the strategic planning process by involving internal and external stakeholders, and direct the development of a comprehensive strategic plan.	05/01/14	08/01/14	May, 2014	In Progress	Superintendent/Cabinet	\$0	\$0	\$0	\$0		A strategic planning committee is in the process of being developed. The board of Education has contracted with Battelle to facilitate the strategic planning process.. Planning sessions have been scheduled with all stakeholders. Including in the planning are focus groups that include parents, students, teachers, and administrators. Additionally, central administration district leaders will provided several days of professional development regarding the planning and development of the strategic plan.		3 1
2-15 Charge the Strategic Planning Committee with the task of creating a strategic plan which includes the critical components of successful strategic plans and planning processes.	05/01/14	08/01/15	May, 2014	In Progress	Superintendent/Strategic Planning Committee	\$0	\$0	\$0	\$25,000		A strategic planning committee is in the process of being developed. The board of Education has contracted with Battelle to facilitate the strategic planning process.. Planning sessions have been scheduled with all stakeholders. Including in the planning are focus groups that include parents, students, teachers, and administrators. Additionally, central administration district leaders will provided several days of professional development regarding the planning and development of the strategic plan.		4 1
2-16 Develop an institutionalized budget planning process designed to reflect strategic planning outcomes and support accountability needs.	09/01/14	06/30/16	09/01/14		Cleland/Finance Committee	\$0	\$0	\$0	\$0		Office of Management and Budget has made a request with budget center directors to provide 5 year budget plan for their departments. These plans will be incorporated in the 5 year forecast and budget building processes. Upon completion of a district strategic plan, this process will be refined as necessary.	This recommendation is more closely associated with support services.	2
2-17 Expand the responsibilities of the Office of Accountability, Assessment, and Research to include strategic planning and accountability. As recommended in Section 2.4.1, this office should be renamed as the Office of Strategic Planning, Accountability, and Assessment.	04/01/14	08/01/14			Superintendent/Murphy/Strategic Planning Committee	\$0	\$0	\$0	\$0		Will review as part of the strategic planning process. Negotiate item.		4 3
2-18 Hire an in-house counsel and reduce expenditures for legal services by at least \$15 per student.	10/01/13	02/01/14	10/01/13	Complete, 3/15/2014	Murphy/Human Resources Committee	\$730,000	\$0	\$0	\$0		Job description and potential savings have been reviewed. In house counsel hours have been increased from 9 hours a week to 16 hours a week based on data from this past year which indicated a significant savings to the district. Complete. The district will continue to review data and increase in house counsel hours based on need.		4 2

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2-19 Implement a comprehensive case management system.	10/01/13	09/01/14	10/01/13	Complete, 4/15/2014	Murphy/Human Resources Committee	\$0	\$0	\$0	\$0		The district is provided frequent updates to all pending litigation cases in the district with details of each case and financial status.	4	3
2-20 Conduct a comprehensive evaluation of all legal services at least every two years.	06/01/15	08/01/15			Murphy/Human Resources Committee	\$0	\$0	\$0	\$0		Will begin in 2015.	4	3
2-21 Add the position of Communications Manager to the TPS Office of Communications.	01/01/13	03/01/13	11/01/13	Complete 3/1/2014	Murphy/CPR Committee	\$0	\$0	(\$391,910)	\$350,000		Complete	4	2
2-22 Monitor all public relations contracts with outside vendors and ensure accountability for deliverables.		08/01/15		Complete, 11/1/2013	Irving/CPR Committee	\$0	\$0	\$0	\$0		Complete. A form has been developed by the communications office which tracks contracts and ensured accountability.		2
Chapter 2 Totals	18	22	12	12		\$9,181,750	\$0	(\$491,910)	\$400,000				
CHAPTER 3.0 EDUCATIONAL SERVICE DELIVERY													
3-1 Adopt the proposed organizational structure for the Curriculum and Instructional Division in Toledo Public Schools.	07/01/13	07/01/14	07/01/13	08/01/16	Gault	\$0	\$0	(\$1,175,605)	\$0		Administrative Position are currently being negotiated.	Direct Report	1
3-2 Negotiate authority for instructional leadership back into the hands of school and central office administrators.	NA	NA	NA	NA	Cabinet	\$0	\$0	\$0	\$0		Negotiated with TAAP and TFT	Direct Report	2
3-3 Determine the most pressing instructional needs for the Toledo Public Schools and initiate plans to address them in order to build teacher capacity and student academic success.	07/01/13	06/01/15	07/01/13		Gault	\$0	\$0	\$0	\$0		Committees have been established for Student Learning Objective (SLO's) around INFORMATIONAL TEXT as well as specific content. Committees have been established for Special Education, Career Tech, Graduation	Direct Correlation	1
3-4 Review all grant opportunities and related staffing through the District Leadership Team, and hire a grant writer.	07/01/13	11/26/13	07/01/13	11/26/13	Gault	\$0	\$0	\$0	\$0		All Grants will be sent through the DLT.	Direct Report	2
3-5 Promote distance learning options to all students and assign staff to the labs only when students are present.	NA	NA	NA	NA	Cabinet	\$0	\$0	\$0	\$0		Negotiated with TFT	Direct Correlation	2
3-6 Examine with the union the benefits of similar waived teaching conditions to potentially extend them to teachers in all TPS schools.	NA	NA	NA	NA	Cabinet	\$0	\$0	\$0	\$0		Negotiated with TFT	Direct Correlation	3
3-7 Systematize the use of student data for decisions regarding program and instructional effectiveness and related revisions, staffing, and professional development.	07/01/13	06/01/15	07/01/13		Gault and Curriculum Committee	\$0	\$0	\$0	\$0		Data is being requested for each Program and Committee. Data is being analyzed for the effectiveness of programs and resources	Direct Correlation	1
3-8 Develop a plan and timeline for the evaluation of educational programs and services, and regularly use it to make funding and program decisions.	07/01/13	06/01/15	07/01/13		Gault	\$1,500,000	\$0	\$0	\$0		Data is being requested for each Program and Committee. Data is being analyzed for the effectiveness of programs and resources	Direct Correlation	1
3-9 Examine staffing issues related to seniority and bumping, and discuss with the union the impacts on students and operational integrity to make student-centered changes.	NA	NA	NA	NA	Cabinet	\$0	\$0	\$0	\$0		Negotiated with TFT	Direct Correlation	3
3-10 Develop job descriptions with accountability strategies for all curriculum and instruction positions and eliminate district-level Teachers on Special Assignment who do not directly support school buildings.	08/01/14	08/01/16	08/01/14		Cabinet	\$2,648,100	\$0	\$0	\$0		We have made progress by eliminating Data Coordinators and having them work to teach technology to students part-time	Direct Correlation	2
3-11 Eliminate supplementals for activities that are directly related to staff job descriptions.	NA	NA	NA	NA	Cabinet	\$4,500,000	\$0	\$0	\$0		Negotiated with TAAP and TFT	Support Services- Financial Only	3
3-12 Pilot professional development initiatives in a few schools where faculty have shown interest or students have demonstrated a need before expanding district wide.	07/01/13	08/01/14	07/01/13	08/01/14	Gault	\$0	\$0	\$0	\$0		PBIS, Parental Portal, BAPS, Science Initiative, Performing Arts	Direct Correlation	2
3-13 Develop uniform strategies that identify and target student needs and that ensure that all special education students are receiving appropriate instruction for their needs in the least restrictive environment in Toledo Public Schools.	07/01/13	08/01/15	07/01/13		Spangler	\$0	\$0	\$0	\$0		Expansion of LRE and Inclusion Model to High Schools- 2nd consecutive year of VA A rating	Direct Correlation	1
3-14 Eliminate supplements for reporting Medicaid services, and direct employees to perform recordkeeping as an essential part of their job responsibilities.	NA	NA	NA	NA	Cabinet	\$403,715	\$0	\$0	\$0		Negotiated with TAAP and TFT	Support Services- Financial Only	3
3-15 Negotiate special education class sizes to comply with state guidelines.	NA	NA	NA	NA	Cabinet	\$18,236,990	\$0	\$0	\$0		Negotiated with TFT- also believe that this would hurt instruction.	Direct Correlation	4
3-16 Address more aggressively commitments made in the Corrective Action Plan and initiate planned program improvements in the TPS Gifted Program.	07/01/13	06/01/15	07/01/13		Cabinet	\$0	\$0	\$0	\$0		Gifted Director has been hired as well as 2 of the 6 teachers we need.	Direct Correlation	1
3-17 Plan collaborative strategies and curriculum to strengthen the performance of ESL students and continue program growth.	07/01/13	08/01/13	07/01/13	08/01/13	Schaber	\$0	\$0	\$0	\$0		All ELL teachers have been included in district PD for ELA, Common Core, All had opportunity to attend Ohio TESOL conference. Inservice with PreSchool and ELL occurred. School have contacted individual ELL teachers to present ELL information at their staff meetings.	Direct Correlation	1
3-18 Immediately finalize implementation procedures and create an accountability system for textbooks and related expenditures.	03/01/13	09/01/13	09/01/13	09/01/13	Mendenhall	\$0	\$0	\$0	\$0		Completed in May of 2013 at cost of \$439,931.74 - Currently have shipped \$1,081,339.72 materials within District.	Direct Correlation	1
3-19 Embrace diverse opportunities for student learning beyond traditional textbooks.	07/01/13		07/01/13		Martinez and Cabinet	\$5,160,000	\$0	\$0	\$0		Blended Learning Model started at Arlington in August.	Direct Correlation	3
Chapter 3 Totals	12	11	12	5		\$32,448,805	\$0	(\$1,175,605)	\$0				
CHAPTER 4.0 HUMAN RESOURCES MANAGEMENT													
4-1 Expand the definition of "Limited Rights" to include those classifications of employees involved with all personnel matters, and eliminate the Human Resources staff from the clerical 'Bump Day' procedure.	05/01/13	08/01/13	05/01/13	08/01/13	Gant/Spieldenner	\$0	\$0	\$0	\$0		Limited Rights is defined in ORC. Numerous attempt to classify HR positions as personnel have been made as making this change is contractual and must be negotiated. We will continue through future negotiation efforts to work collaboratively with the union to attempt to address the bump language and find a resolution that will be acceptable to both management and union as we make efforts to improve the service we provide our district.	This recommendation is more closely associated with support services.	2

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4-2 Reorganize the Human Resources Department to improve efficiency of operations.	05/01/13	08/01/15	05/01/13		Spieldenner	\$499,010	\$0	\$0	\$0		The implementation of the new SunGard HR/PY will have a direct impact on the reorganization of the department/division. The job duties that have been firmly established in both the payroll and HR offices are dramatically shifting to the best practice standards recommended by SunGard. Until the system is up and fully operational and duties firmly established by department, we cannot make changes to the department structure. Once the program is fully implemented, the department duties will be reviewed and staff shifted from payroll to HR as needed as most of the labor intensive duties have shifted to HR as a best practice.	This recommendation is more closely associated with support services.	1
4-3 Create a Benefits Coordinator classification as a part of the proposed reorganization of the Human Resources Department.	05/01/13	08/01/13	05/01/13	01/01/14	Spieldenner	\$0	\$0	(\$305,925)	\$0		Completed	This recommendation is more closely associated with support services.	1
4-4 Reclassify the Secretary positions in the Human Resources Department and create Human Resources Assistant positions.	05/01/13	08/01/13	05/01/13	08/01/13	Gant/Spieldenner	\$0	\$0	\$0	\$0		Completed	This recommendation is more closely associated with support services.	2
4-5 Using the established desk manuals, where possible, develop detailed classification descriptions for the Human Resources Assistant position.	05/01/13	04/01/15	05/01/13		Spieldenner	\$0	\$0	\$0	\$0		The staff in the division have desk duty books. We will continue to update and develop standard operating procedure forms (SOPs). With the implementation of SunGard, the majority of job duties and processes will dramatically change for the division and new processes will need to be established. Paid internships through UT were only available this semester. However, we will again attempt to secure HR students from the University to assist with mapping out the department processes for the division once we have stability with the SunGard function.	This recommendation is more closely associated with support services.	3
4-6 Implement a metric tracking system that captures outcome data for all major human resources functions and report on metrics annually to the Superintendent and Cabinet.	11/01/13	01/01/15	11/01/13		Spieldenner	\$0	\$0	\$0	\$0		Current recruitment data being retained with baselines being established. Will be utilized in conjunction with division strategic plan.	This recommendation is more closely associated with support services.	2
4-7 Collect and assess performance data for human resource employees and incorporate into annual performance evaluations.	11/01/13	01/01/15	11/01/13		Spieldenner	\$0	\$0	\$0	\$0		Standardized process will be developed with development of SunGard HR/PY.	This recommendation is more closely associated with support services.	1
4-8 Work as a team to develop interdepartmental process maps for major operations in the Human Resources Department.	11/01/13	01/01/15	11/01/13		Spieldenner	\$0	\$0	\$0	\$0		A number of these functions are related to the implementation of the SunGard HR/PY process. However, the process for the RFPA has been started through a strategic group implemented by Mr. Murphy. The MOU process, although not formally formatted as a process map, has also been established and has been shared throughout the district stakeholders responsible for MOUs and has stabilized the MOU process for the district. A number of other areas do need to be mapped out and once the implementation of the HR/PY system is complete the district will shift to addressing the processing mapping for other areas.	This recommendation is more closely associated with support services.	1
4-9 Develop a comprehensive districtwide professional development master plan.	11/01/13		11/01/13		Spieldenner/District Wide	\$0	\$0	\$0	\$0		Those areas that are mentioned in the Performance Audit include: Bloodborne Pathogens is a currently a long term established process that is offered to all staff members who require the training. Child abuse training is conducted by the school counselors as part of their annual training. Harassment training is provided to staff members through the annual conference days as well as through staff meetings. The district is currently meeting with a number of candidates on providing train the trainer programs for on going harassment training within the district. Training for coaches are functions that are conducted by licensed professionals outside of TPS. For example, the CPR and sports medicine training has to be conducted by certified professionals.	This recommendation impacts the staff that serve in support and direct service to the classroom.	1
4-10 Implement a web-based, career ladder training program that allows employees to train for higher positions in the district based on specific classification requirements.	06/01/15					\$0	\$0	(\$15,000)	\$0		For on line training we will be reviewing options such as Blackboard or Google classroom to institute an on line learning system for the district.	This recommendation impacts the staff that serve in support and direct service to the classroom.	3

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4-11 Update customer service training materials and hold employees accountable for the customer service they deliver.	05/01/13	06/01/15	05/01/13		Spieldenner	\$0	\$0	\$0	\$0		New customer service training materials have been purchased and are being used district wide with retraining periodically taking place.	This recommendation is more closely associated with support services.	1
4-12 Develop and implement a staff and customer feedback system to assist human resources in evaluating the nature and quality of its services on a regular basis.	11/01/13	01/01/15	11/01/13		Gant/Spieldenner	\$0	\$0	\$0	\$0		Currently being developed by administrative team through strategic process in conjunction with Mr. Murphy.	This recommendation is more closely associated with support services.	1
4-13 Develop a plan that links the Human Resources Department's goals to the budget allocation.	07/01/13	06/30/14	07/01/13	06/01/14	Spieldenner	\$0	\$0	\$0	\$0		Budget for focus on recruitment has been adjusted as has implementation of new part time position for clerical trainer. Implementation of SunGard will have extensive impact on this goal as positions will be shifting from payroll to HR to accomplish the tasks necessary for SunGard. The extent of this change is not yet known as the new system is not implemented.	This recommendation is more closely associated with support services.	1
4-14 Develop a consistent personnel file content checklist to ensure that only approved information is included in personnel files and conduct regular random audits of personnel files to ensure compliance.	07/01/14	08/01/15			Spieldenner	\$0	\$0	\$0	\$0		Personnel file audit document has been established. Documentation will follow retention requirements and legally obligated documentation we must retain. This is a process that can be completed by trained substitute staff members once the resources are available.	This recommendation is more closely associated with support services.	3
4-15 Implement a document imaging system for record maintenance.	01/01/15	01/01/16			Spieldenner	\$0	\$0	(\$100,000)	\$0		In progress in conjunction with Business Division.	This recommendation is more closely associated with support services.	2
4-16 Develop a comprehensive recruitment plan (including a mission statement, goals, measurable objectives, needs assessment, analysis and evaluation of past efforts, and strategies) for attracting employees to Toledo Public Schools.	11/01/13	01/01/15	11/01/13		Murphy/Spieldenner	\$0	\$0	\$0	\$125,000		Full recruitment strategy is in place and is adjusted to meet the vacancies in the district. Strategic planning process is in place for the division and is continually reviewed and	This recommendation impacts the staff that serve in support and direct service to the classroom.	1
4-17 Develop a succession plan to ensure continuity of services in Toledo Public Schools.	11/01/13		11/01/13		Spieldenner	\$0	\$0	\$0	\$0		TAAP = ULDP Program TFT = Intern Program for new hires AFSCME = cross training on positions. For cabinet need to identify those who will need to be replaced and identify high performing staff members to fill these position. Succession planning at this level is a long term and committed process by all stakeholders to develop the necessary skills for potential candidates to fill upcoming vacancies in the upper levels of the district. Potential candidates need to be identified from high performing and potential candidates throughout the district. This planning is an on-going process.	This recommendation impacts the staff that serve in support and direct service to the classroom.	1
4-18 Curtail restrictions on ULDP participants and increase their exposure to real-world leadership opportunities.	07/01/13	08/01/13	08/01/13	08/01/13	Spieldenner	\$362,000	\$0	\$0	\$0		Completed	This recommendation impacts the staff that serve in support and direct service to the classroom.	1
4-19 Develop and implement a diversity plan that assesses applicant pool demographics and sets recruitment and retention goals.	08/01/14	07/31/15			Spieldenner	\$0	\$0	\$0	\$0		With eligible and available candidates, this can be done through the new hire process.	This recommendation impacts the staff that serve in support and direct service to the classroom.	1
4-20 Conduct a comprehensive classification and compensation study to address potential issues of internal and external equity, and accuracy of job descriptions.	07/01/14	09/01/14			Spieldenner	\$0	\$0	(\$125,000)	\$0		The RFP has been completed and has been awarded.	This recommendation is more closely associated with support services.	1
4-21 Enforce the union contract requirements which are explicit as to the circumstances which require the creation of an MOU for each of the three collective bargaining units, and reduce total MOUs by 75 percent.	06/01/13	06/01/13	06/01/13	06/01/13	Spieldenner	\$0	\$0	\$0	\$0		Completed	This recommendation is more closely associated with support services.	1
4-22 Eliminate the bump day process.	05/01/13		05/01/13		Spieldenner/Gant	\$0	\$0	\$0	\$0		Management will continue to work with AFSCME to address bump day process through negotiation process.	This recommendation is more closely associated with support services.	1
Chapter 4 Totals	19	15	14	6		\$861,010	\$0	(\$545,925)	\$125,000				
CHAPTER 5.0 FINANCIAL MANGEMENT													
5-1 Reorganize the Treasurer's Division, and redefine and fill the vacant positions to ensure that the division can fully automate labor-intensive and error-prone processes and provide greater levels of service to its users, the Board, and the public.	07/01/13	12/31/13	04/01/13	02/25/14	Cleland	\$145,590	\$152,000	\$0	\$0	Position eliminations were made prior to 7/1/13 so additional savings will be realized over the estimate.	Two positions eliminated last Spring. Some job duties re-assigned. Reorganization is complete with positions filled effective February '14. Future vacancies will be addressed as they occur.	This recommendation is more closely associated with support services.	1
5-2 Fully implement the financial components of the SunGard system, and create user-friendly reporting and data extraction capabilities that assist rather than inhibit campus and department decision-making processes.	10/01/13	10/01/16	07/01/13	09/01/18	Cleland	\$462,052	\$462,052	\$0	\$0	Savings will be the same as estimated, however the reductions took place with one in year one and one in year three rather than two in year two.	Financial Information Coordinator hired 12/18/13 with responsibility for this process. Initial efforts have been on training and support in treasurer's division. Next steps include items for end user support. This process is continuous with no completion.	This recommendation is more closely associated with support services.	1
5-3 Create a Campus/Departmental Operations Manual made up of basic instructions for conducting each of the key functions performed by campus-level staff.	03/01/14	06/01/15	07/01/13		Cleland	\$0	\$0	\$0	\$0		The purchasing manual is being re-written/corrected. Treasurer and all directors in Treasurer's Division have work in progress desk manuals.	This recommendation is more closely associated with support services.	1

Performance Audit Progress Tracking Spreadsheet

Recommendation	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Person Responsible	Evergreen Five Year Savings Estimate	TPS Five Year Savings Estimate	Evergreen Five Year Cost Estimate	TPS Five Year Cost Estimate	Explanation of Variance in Projected vs Actual Costs	Comments	Proximity to Classroom	Priority (1-4)
5-4 Establish a process whereby the Board's Finance Committee and the Superintendent's Cabinet review the results of the Annual Audit as well as the issues resulted in the Auditor's Management Letter and are kept apprised of the corrective actions being taken to address those issues.	07/01/13	09/30/13	07/01/13	09/30/13	Cleland	\$0	\$0	\$0	\$0		Audit corrective action plan presented to Finance Committee last Spring. Board resolution appointing audit committee members passed in September 2013. Audit committee continues to meet as scheduled.	This recommendation is more closely associated with support services.	2
5-5 Adjust the amount of the district's contribution to Fund 024 to meet the needs of the fund as defined by TPS actuaries.	07/01/13	06/30/14	06/01/13		Cleland	\$12,500,000	\$8,500,000	\$0	\$0	The Evergreen estimate did not take into account "trending" of medical expense (inflation) so future savings beyond the first years adjustments will not be realized. In fact medical expenses have caused the self insurance fund to fall below the actuarial target by the end of FY14.	Adjustments incorporated into the FY14 budget. Final adjustment will be made on schedule by June 2014. Savings is spread across multiple funds.	This recommendation is more closely associated with support services.	1
5-6 Develop a Budget Calendar and budget creation guidelines that allow for meaningful input from internal stakeholders as well as the Board and the community.	03/01/13	06/30/14	04/01/13		Cleland	\$0	\$0	\$0	\$0		Budget center directors met with and participated in OMB budget build process for FY14. Budget narratives have been completed for FY14 and FY15 for stakeholders review and understanding of the budget.	This recommendation is more closely associated with support services.	3
5-7 Adopt the nationally recognized standards for budget preparation, including the adoption of a formal budget calendar, and apply for either the ASBO or GFOA budget awards.	07/01/13	06/30/15	09/01/13		Cleland	\$0	\$0	(\$5,500)	\$0		Budget presentation was created for FY14 laying the ground work for a future format that maybe submitted for award.	This recommendation is more closely associated with support services.	3
5-8 Implement a Purchasing Card (P-Card) system to replace petty cash accounts.	10/01/13	03/31/14	10/01/13		Cleland	\$65,000	\$0	\$0	\$0		Proposal to eliminate petty cash has been provided to the Treasurer. Research on Pcard RFPs has been done. Pcard process and policies have been reviewed in anticipation of change. Additional work is necessary to be certain cards are not used to circumvent the purchasing process. Final decision will be submitted to the board finance committee for approval.	This recommendation is more closely associated with support services.	2
5-9 Explore the possibility of centralizing more of the district's purchasing functions under Business Operations and Administration as a way to increase competition and remove some of the administrative burden in other departments.					Gant	\$250,000	\$0	\$0	\$0			This recommendation is more closely associated with support services.	
5-10 Immediately begin the process of converting Human Resources and Payroll to SunGard, with a goal of having the Human Resources modules fully implemented by 2014-15.	05/01/13	06/30/15	04/01/13		Cleland	\$574,476	\$219,306	\$0	\$0	Cost savings from implementation of Sungard is represented as the elimination of expense associated with the mainframe less cost of project manager for implementation. The savings does not begin until one year after "go live" date which means there will be only three year's savings rather than five.	Contract for implementation signed April 2013. Business Process Review completed October 2013. Implementation underway with go live date of January 2015.	This recommendation is more closely associated with support services.	1
5-11 Redefine the vacant Assistant Director position to require knowledge and experience with SunGard, and assign this individual responsibility for assisting with the conversion.	07/01/13	12/31/13	04/01/13	02/25/14	Cleland	\$0	\$0	\$0	\$0		Job description written and position filled 2/25/14	This recommendation is more closely associated with support services.	2
5-12 Work with labor organizations to seek ways to simplify payroll by including all possible payroll add-ons in the employee's regular salary, and begin issuing special payrolls via direct deposit where possible.	09/01/13	01/01/15	07/01/13		Cleland	\$0	\$0	\$0	\$0		Limited discussion has taken place. Suggested changes in process need to be identified and presented to unions.	This recommendation is more closely associated with support services.	1
5-13 Assign emails to all TPS employees, and begin distribution of pay stubs electronically.	10/01/13	01/31/14	11/01/13		Cleland	\$0	\$80,000	\$0	\$0	Printing and postage for paystub forms being reduced to a portion of paystubs being printed on letter paper will create supply savings. Savings in labor or opportunity are not represented.	Successful tests of emailed pay advice began in Dec. '13 with goal of use with all employees in June '14. All employees are receiving paper and email advice with paper to be eliminated in September 2014.	This recommendation is more closely associated with support services.	1
5-14 Implement a process whereby pay is held until such time as a signed contract is on file.	02/01/13	07/30/13	04/01/13	07/30/13	Cleland	\$0	\$0	\$0	\$0		Completed May 2013.	This recommendation is more closely associated with support services.	3
5-15 Conduct an analysis of the reasons for all confirming purchase orders and initiate a process whereby remedies are developed for each scenario.	10/01/13	03/31/14	07/01/13		Cleland	\$0	\$0	\$0	\$0		New uses of blanket Pos have been put into place. Meetings are being held with Business and Treasurer's office staff. Other processes have been added to reduce need for confirmation. Recent month's lists have been approximately 15 Pos.	This recommendation is more closely associated with support services.	2
5-16 Establish a succession plan for the position of Director for Treasury Management, which includes a deliberate plan for how the district will manage its investments in the future.	09/01/13	06/30/15	09/01/13		Cleland	\$0	\$0	\$0	\$0		Director of Treasury Management is preparing a detail desk manual. Other succession plans must be developed.	This recommendation is more closely associated with support services.	1
5-17 Establish an inventory system that assigns personal responsibility to the individuals with custody of the assets, and enforce the Board policies relating to annual counts at the campus level.	05/01/13	06/30/14	03/01/13		Cleland	\$0	\$0	\$0	\$0		Complete update of the fixed assets process is being updated by the Accounting and Finance Department. Expected completion is Summer 2014 for critical Federal funds and 2015 for remaining funds. Policy has been updated to facilitate the plan that is in place.	This recommendation is more closely associated with support services.	2
5-18 Ensure that future depository agreements contain a termination clause that would expressly allow the district to terminate the agreement if the terms and conditions of the agreement are not met.	03/01/16	07/01/16	03/01/16		Cleland	\$0	\$0	\$0	\$0		This can be resolved when agreements are up for renewal in 2016.	This recommendation is more closely associated with support services.	4
Chapter 5 Totals	17	17	17	5		\$13,997,118	\$9,413,358	(\$5,500)	\$0				
CHAPTER 6.0 FACILITIES													
6-1 Consolidate the Construction Management Office (Coordinator of Construction Projects) and activities under the Maintenance and Operations Department.	07/01/13	08/01/13	07/01/13	08/01/13	Gant	\$0	\$0	\$0	\$0		The recommendation was completed by the dated indicated. This recommendation does not have any financial implication.	This recommendation is more closely associated with support services.	4
6-2 Establish and use Facilities Management Key Performance Indicators (KPI) to evaluate past performance and benchmark against peer organizations.	07/01/13	05/01/15	07/01/13		Reynolds	\$0	\$0	\$0	\$0		Strategic Plan and Score Card will incorporate Key Performance Monitoring	This recommendation is more closely associated with support services.	4

Performance Audit Progress Tracking Spreadsheet

Recommendation	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Person Responsible	Evergreen Five Year Savings Estimate	TPS Five Year Savings Estimate	Evergreen Five Year Cost Estimate	TPS Five Year Cost Estimate	Explanation of Variance in Projected vs Actual Costs	Comments	Proximity to Classroom	Priority (1-4)
6-3 Prepare and implement a five-year facilities master planning process in Toledo Public Schools.						\$0	\$0	(\$30,000)	(\$30,000)		Strategic Plan and Score Card and OFSC will review and establish five - year master planning	This recommendation is more closely associated with support services.	4
6-4 Develop a surplus property preservation and disposal plan.	07/01/13	08/01/15	07/01/13			\$3,359,176	\$1,000,000	\$0	\$0	I believe estimate is high, given the current surplus property.	McKinley sold, Whitney expected within FY14. Plan to engage firm and/or process once determination is made on the property that we intend to sell.	This recommendation is more closely associated with support services.	4
6-5 Retain a designated realtor services firm or agent to represent Toledo Public Schools in disposal of surplus real estate through a competitive procurement process.	07/01/13	08/01/15	07/01/13				\$0	\$0	\$0		This recommendation does not have any financial implication.	This recommendation is more closely associated with support services.	4
6-6 Relocate the central office staff and functions into available adequate space.	07/01/13	07/01/15	07/01/13			\$1,055,000	\$0	\$0	\$0	With the purchase of property and the costs of renovations, it is not believed that the district will realize the savings indicated in the performance audit. However, long term savings will be realized given the utilization of the buildings and the established partnerships.	Feasibility studies in progress	This recommendation is more closely associated with support services.	4
6-7 Consolidate two sets of K-8 schools.						\$2,997,000	\$0	\$0	\$0	Although this will driven by educational needs. Given our current enrollment and programs it doesn't seem feasible to consolidate two sets of K-8 schools.	Strategic Plan and Score Card will assist in evaluating this recommendation.	This recommendation is more closely associated with support services.	4
6-8 Organize and digitize the collection of as-built drawings and operations/maintenance manuals for all new schools as a priority project.	06/17/13	08/01/14	06/17/13	02/15/14	Swartz	\$0	\$0	\$0	\$0		The recommendation was completed by the dated indicated. This recommendation does not have any financial implication.	This recommendation is more closely associated with support services.	4
6-9 Establish a customer service program with training for department employees and an awareness campaign for customers (school administrators and staff).							\$0	\$0	\$0		The business office will work with Human Resources to complete the recommendation	This recommendation is more closely associated with support services.	3
6-10 Conduct a workload analysis as a basis to adjust trades staffing levels and determine the optimum balance of in-house and contract resources.	06/17/13	08/01/14	06/17/13		Reynolds	\$776,850	\$0	\$0	\$0		Analysis in progress. Expected budget amendment from services to salaries for FY15	This recommendation is more closely associated with support services.	3
6-11 Provide additional professional development in facilities maintenance management system principles and TEAMWORKS.	07/01/13	08/01/13	07/01/13	08/01/13	Reynolds		\$0	(\$7,500)	\$10,000		The recommendation was completed by the dated indicated. This recommendation does have additional expenses because of device costs	This recommendation is more closely associated with support services.	3
6-12 Upgrade and migrate the facilities maintenance management system to a mobile device-based operation.	07/01/13	08/01/13	07/01/13	08/01/13	Reynolds	\$205,147	\$0	\$0	\$0		Migration complete. Fuel usage will be monitored for savings.	This recommendation is more closely associated with support services.	
6-13 Actively reduce and manage surplus property through an online sales system and process.	07/01/13	09/01/15	07/01/13			\$500,000	\$100,000	\$0	\$0	I believe estimate is high, given the current surplus property.	One auction held at Whittier to date.	This recommendation is more closely associated with support services.	
6-14 Continue to replace steam boilers with hydronic central heating systems (or package units) and replace Boiler Operators with Site Coordinators.	07/01/13	08/01/17	07/01/13			\$234,348	\$0	\$0	\$1,500,000	The performance audit does not consider the costs to replace the boilers.	HB264 application submitted to OFCC	This recommendation is more closely associated with support services.	
6-15 Restructure staff at secondary schools to implement a true team cleaning process.	07/01/13	08/01/15	07/01/13				\$0	\$0	\$0		The team cleaning approach should result cleaner buildings.	This recommendation is more closely associated with support services.	
6-16 Expand the custodial role to that of Building Energy and Safety Technician.	07/01/13	08/01/14	07/01/13				\$0	\$0	\$0		This is currently in process	This recommendation is more closely associated with support services.	
6-17 Establish a comprehensive, behavior-centered energy conservation management program.	07/01/13	08/01/14	07/01/13			\$6,062,215	\$5,000,000	\$0	\$0	Implementation of equipment and program. Otherwise, the district estimates that it will gain significant savings.	Transformers replaced and new control system implemented. Savings will be used to pay for implementation.	This recommendation is more closely associated with support services.	
6-18 Restructure the Community Use of Facilities policies and procedures to establish a formal Facilities Use and Scheduling System, exponentially increasing rental income and optimizing cost recovery to the district.	07/01/13	08/01/15	07/01/13			\$1,320,648	\$300,000	\$0	\$0	TPS is established that its building will be utilized for community. It is not anticipated that this facilities will be major revenue producers.	Policy has been revised. Additional revenue not expected.	This recommendation is more closely associated with support services.	
Chapter 6 Totals	10	10	10	3		\$16,510,384	\$6,400,000	(\$37,500)	\$1,480,000				
CHAPTER 7.0 FOOD SERVICE													
7-1 Require the Director to make more frequent campus visits and cafeteria observations as a way to build a mutual spirit of collaboration in and among cafeteria workers and campus administrators, and to increase the level of cafeteria supervision.	5/3/2013	8/28/2013	5/3/2013	8/28/2013	Debroas	\$0	\$0	\$0	\$0		The recommendation was completed by the dated indicated. This recommendation does not have any financial implication.	This recommendation is more closely associated with support services.	4
7-2 Implement districtwide procedures for more timely notification when freezer or coolers experience a rise in temperatures and immediately install or activate the alarm systems on the last two campuses not yet monitored.	5/17/2013	8/1/2015	5/17/2013		Debroas	\$0	\$0	\$0	\$0		This is in process, there are a few more alarms that need to be established.	This recommendation is more closely associated with support services.	4
7-3 Work with the Human Resources Department to establish a larger pool of viable substitutes, and negotiate a process for posting regular vacancies to the outside when no bids are received internally.	5/3/2013	8/1/2014	5/3/2013	8/1/2014	Debroas	\$0	\$0	\$0	\$0		The business office will work with Human Resources to complete the recommendation	This recommendation is more closely associated with support services.	3
7-4 Establish meals per labor hour(MPLH) standards for each school and annually adjust staffing hours to achieve those standards.	5/24/2013	8/27/2013	5/24/2013	8/27/2013	Debroas	\$702,600	\$150,000	\$0	\$0	I do not foresee annual reductions based upon MPLH	Standard established. Staffing adjusted.	This recommendation is more closely associated with support services.	4
7-5 Explore alternative breakfast delivery systems and implement programs that will maintain or grow breakfast participation in the future.	5/20/2013	8/1/2015	5/20/2013	8/1/2015	Debroas	\$0	\$0	\$0	\$0		The recommendation was completed by the dated indicated. This recommendation does not have any financial implication.	This recommendation is more closely associated with support services.	4
7-6 Immediately correct the bi-weekly payroll for each employee to include all routine work hours and closely examine the impact on the employee's benefit eligibility.	5/20/2013	8/1/2015	5/20/2013	8/1/2015	Debroas	\$0	\$0	\$0	\$0		The recommendation was completed by the dated indicated. This recommendation does not have any financial implication.	This recommendation is more closely associated with support services.	4
7.7 Provide cafeteria managers at least three or four opportunities per year, in addition to regular meetings, for sharing ideas and concerns among themselves.	5/20/2013	8/1/2014	5/20/2013	8/1/2014	Debroas	\$0	\$0	\$0	\$0		The recommendation was completed by the dated indicated. This recommendation does not have any financial implication.	This recommendation is more closely associated with support services.	4
7-8 Charge all appropriate and eligible annual expenditures to the Food Service Fund and record the actual amount of TPS contributions necessary to balance the fund deficit.	5/20/2013	8/1/2015	5/20/2013	8/1/2015	Debroas	\$750,000	\$500,000	\$0	\$0	This will be additional expenses that Food Service will be able to incur instead of the general fund. However this is expense to food service.	The recommendation is no longer valid, because the district moved to meals at no costs for breakfast and lunch in the elementaries.	This recommendation is more closely associated with support services.	4
7-9 Explore and implement automation, integrate systems, and create needed policies and procedures to eliminate the need for paper and duplicative data entry, and reduce error prone processes.	5/20/2013	8/1/2015	5/20/2013	8/1/2015	Debroas	\$126,120	\$0	\$0	\$0	POS system will not eliminate hours of work.	The recommendation is no longer valid, because the district moved to meals at no costs for breakfast and lunch in the elementaries.	This recommendation is more closely associated with support services.	4

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7-10 Work with Business Operations and the Treasurer's Office to diagnose the reason price changes are being missed and determine the best method for validating the invoice prices before payment.	01/01/14	08/01/14	01/01/14	08/01/14	Debroas	\$0	\$0	\$0	\$0		The food service department should be able complete this year.	This recommendation is more closely associated with support services.	4
7-11 Develop a plan for identifying those students who may be eligible for the free and reduced price meal programs, and aggressively reach out to those parents to obtain an application.	05/20/13	08/15/14	05/20/13	08/15/14	Debroas	\$0	\$0	\$0	\$0		This is less of an issue because of CEP	This recommendation is more closely associated with support services.	3
7-12 Establish and enforce a Board policy regarding the provision of alternative meals to students who do not have money to pay for full-price meals.	05/20/13	10/01/13	05/20/13	10/01/13	Debroas	\$25,000	\$25,000	\$0	\$0		Presented procedure to Ad-hoc Food Service Committee and implemented.	This recommendation is more closely associated with support services.	4
7-13 Purchase and install POS systems and terminals at each of the 41 elementary campuses prior to the beginning of the 2013-14 school year.	05/15/13		05/15/13		Debroas	\$1,445,849	\$0	\$0	\$0	TPS now serves food to all elementary students at no costs. Also the POS does not reduce hours.	The recommendation is no longer valid, because the district moved to meals at no costs for breakfast and lunch in the elementaries.	This recommendation is more closely associated with support services.	4
7-14 Implement a policy of maintaining the rounded full-priced meal prices at the secondary level at or near the federal reimbursement rate, with all other pricing levels being incrementally adjusted accordingly.	07/20/13	08/01/13	07/20/13	08/01/13	Debroas	\$1,160,400	\$250,000	\$0	\$0	Full prices will not be raised immediately; Food Services is improving the Free/Reduced application process; CEP, which provides meal at no cost to all of the elementary schools.	Increased \$.25 FY14	This recommendation is more closely associated with support services.	4
7-15 Identify all vending machines in operation in the district, and determine compliance with policy and exclusive contract agreements.	05/25/13	09/01/13	05/25/13	09/01/13	Debroas	\$0	\$0	\$0	\$0		This recommendation was completed	This recommendation is more closely associated with support services.	4
7-16 Provide more opportunities for student, parent, and staff input into menus, and develop a plan for providing more flexible menu choices that meet the unique needs of the schools.	05/06/13	08/27/13	05/06/13	08/27/13	Debroas	\$0	\$0	\$0	\$0		This recommendation was completed and continuous, but it does not have any financial implication.	This recommendation is more closely associated with support services.	4
7-17 Prepare a comprehensive nutrition and education plan that takes into account federal and state requirements and creates a vision and mission for nutrition education and the provision of more fresh fruits and vegetables.	08/15/14	08/15/15	08/15/14	08/15/15	Debroas	\$0	\$0	\$0	\$0		The Food Service Department is working with Promedica on these issues.	This recommendation is more closely associated with support services.	3
Chapter 7 Totals	17	16	17	15		\$4,209,969	\$925,000	\$0	\$0				
8.0 TRANSPORTATION													
8-1 Modify the organizational chart of the TPS Transportation Services Department.	07/20/13	08/01/13	07/20/13	08/01/13	Aemisegger	\$0	\$0	\$0	\$0				
8-2 Notify the Transportation Department in a more timely manner of the transportation needs for special education students.						\$0	\$0	\$0	\$0				
8-3 Implement an incentive awards program for TPS transportation employees.	10/1/2013	11/1/2013	10/1/2013	11/1/2013	Aemisegger	\$0	\$0	(\$7,500)	\$0				
8-4 Implement performance indicators in the TPS Transportation Department to more effectively assess efficiency, effectiveness, and performance of the transportation function.	6/1/2013	11/1/2013	6/1/2013	11/1/2013	Aemisegger	\$0	\$0	\$0	\$0				
8-5 Take appropriate action to ensure performance evaluations are completed annually and in compliance with personnel policy.	10/1/2013	1/1/2014	10/1/2013	1/1/2014	Gant	\$0	\$0	\$0	\$0				
8-6 Establish a contact at all schools who is designated to ensure timely action on school bus discipline issues.	5/1/2013	8/1/2013	5/1/2013	8/15/2014	Gant	\$0	\$0	\$0	\$0				
8-7 Take appropriate steps to capture data on deadhead miles and take positive steps to reduce deadhead miles and associated costs.	9/1/2013	8/15/2014	9/1/2013	8/15/2014	Aemisegger	\$0	\$0	\$0	\$0				
8-8 Take appropriate steps to post essential information on the bulletin board in the mechanic work area.	07/20/13	08/01/13	07/20/13	08/01/13	Aemisegger	\$0	\$0	\$0	\$0				
8-9 Establish a 14-year bus replacement plan in Toledo Public Schools.	4/1/2013	8/1/2013	4/1/2013	8/1/2013	Gant/Cleland	\$840,000	\$0	\$0	\$0		Replacement plan exists, timing of expenditure does not represent savings.		
8-10 Eliminate excess spare buses from the inventory and continue maintaining a spare bus policy of 18 buses, or 15 percent of its fleet.	6/1/2013	9/1/2013	6/1/2013	9/1/2013	Aemisegger	\$500,490	\$0	\$0	\$0		Busses and white fleet sold at auction		
8-11 Conduct an audit to reduce the white fleet inventory in Toledo Public Schools.	6/1/2013	9/1/2013	6/1/2013	9/1/2013	Aemisegger		\$0	\$0	\$0		Busses and white fleet sold at auction		
8-12 Eliminate 44 routes/buses from the bus inventory.					Aemisegger	\$7,513,840	\$0	\$0	\$0		Not feasible		
8-13 Implement a training program in the TPS Transportation Services Department for managers and supervisors emphasizing personnel management, sensitivity training, and conflict resolution.	9/1/2013	2/1/2014	9/1/2013	2/1/2014	Gant	\$0	\$0	\$0	\$0				
8-14 Review concerns expressed by drivers and aides and address them in driver training programs.	8/1/2013	10/1/2013	8/1/2013	10/1/2013	Aemisegger	\$0	\$0	\$0	\$0				
Chapter 8 Totals			12	12		\$8,854,330	\$0	(\$7,500)	\$0				
CHAPTER 9.0 SAFETY AND SECURITY													
9-1 Eliminate one Campus Protection Officer (CPO) at Rogers High School.	6/17/2013	8/15/2014	6/17/2013	8/15/2014	Weyandt	\$232,470	\$0	\$0	\$0		Negative impact to school environment outweighs cost savings.		
9-2 Remove use of the SRO floater position and assign an equitable number of locations to the seven SROs.	6/17/2013	8/15/2014	6/17/2013	8/15/2014	Weyandt	\$0	\$0	\$0	\$0				
9-3 Reduce overtime for TPS School Resource Officers (SROs).	6/1/2013	11/1/2013	6/1/2013	11/1/2013	Weyandt	\$88,880	\$0	\$0	\$0				
9-4 Make the Clerk Dispatcher position within the TPS Safety and Security Department a limited rights position.						\$0	\$0	\$0	\$0				
9-5 Include TPS Safety and Security personnel in regularly scheduled meetings with academic leaders.	6/1/2013	11/1/2013	6/1/2013	11/1/2013	Weyandt	\$0	\$0	\$0	\$0				
9-6 Create and distribute emergency event checklists to classrooms and offices for use by TPS staff.	6/1/2013	11/1/2013	6/1/2013	11/1/2013	Weyandt	\$0	\$0	\$0	\$0				
9-7 Establish a comprehensive TPS safety and security training program for all staff.	6/12/2013	8/15/2014	6/12/2013	8/15/2014	Weyandt	\$0	\$0	(\$9,970)	\$0				
9-8 Require that all TPS safety and security incidents and activity be recorded in the School COP system.	7/1/2013	8/15/2014	7/1/2013	8/15/2014	Weyandt	\$0	\$0	\$0	\$0				
9-9 Relocate SRO computer work stations within the central office at their assigned schools.	7/1/2013	8/15/2014	7/1/2013	8/15/2014	Weyandt	\$0	\$0	\$0	\$0				
9-10 Conduct a bid process to determine if alarm maintenance and repair can be contracted at a lower cost than what is currently offered by APC.	6/1/2013	11/1/2013	6/1/2013	11/1/2013	Weyandt	\$0	\$0	\$0	\$0				
9-11 Apply for grant funds to help fund new surveillance technologies and security personnel.	04/15/13	08/15/14	04/15/13	8/15/2014	Weyandt	\$0	\$0	\$0	\$0				
9-12 Establish a camera location priority list to guide replacement of equipment.	06/07/13	08/15/14	06/07/13	8/15/2014	Weyandt	\$0	\$0	\$0	\$0				
9-13 Improve the visitor entry process at all TPS locations by implementing a more stringent and standardized entry protocol.	6/1/2013	11/1/2013	6/1/2013	11/1/2013	Weyandt	\$0	\$0	\$0	\$0				
9-14 Require TPS staff to wear identification badges at all times while on TPS property.	6/1/2013	11/1/2013	6/1/2013	11/1/2013	Weyandt	\$0	\$0	\$0	\$0				
Chapter 9 Totals			13	13		\$321,350	\$0	(\$9,970)	\$0				

Performance Audit Progress Tracking Spreadsheet

Recommendation	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Person Responsible	Evergreen Five Year Savings Estimate	TPS Five Year Savings Estimate	Evergreen Five Year Cost Estimate	TPS Five Year Cost Estimate	Explanation of Variance in Projected vs Actual Costs	Comments	Proximity to Classroom	Priority (1-4)
CHAPTER 10.0 TECHNOLOGY MANAGEMENT													
10-1 Consolidate information system analysts/programmers and information system technology and network-attached equipment support operations into an Information Services and Technology Department in order to eliminate duplicated services.	5/3/2013		5/3/2013		Pregibon/Gant	\$301,350	\$0	\$0	\$0		A new organizational chart has been designed using information from Evergreen performance audit and Plante and Moran technology assessment.		
10-2 Reorganize the Computer Services Department into an Information Services and Technology Department.	6/1/2013	11/1/2013	6/1/2013	11/1/2013			\$0	\$0	\$0				
10-3 Expand the Technology Executive Committee to include representatives from the business administrative areas, school leaders, teachers, other key stakeholders, and user groups.	4/16/2013	8/15/2014	4/16/2013	8/15/2014	Pregibon		\$0	\$0	\$0				
10-4 Develop a five- to ten-year comprehensive plan for all services and systems—including capacity projections, project plans and timelines, and scheduled replacements/upgrades.	4/22/2013	6/22/2014	4/22/2013	6/22/2014	Pregibon		\$0	\$0	\$0				
10-5 Implement standards for the purchase of commonly used hardware, software, and infrastructure/communication items.						\$1,000,000	\$0	\$0	\$0		Plante and Moran has been contracted for a technology assesment which includes standards. Tracking savings from this recommendation will be contiguous with other energy savings and may not be separately identified.		
10-6 Develop school and central office basic technology templates/models.	4/4/2013	12/1/2013	4/4/2013	12/1/2013	Pregibon		\$0	\$0	\$0				
10-7 Eliminate dead-end or no longer used phone lines.	4/4/2013	8/15/2014	4/4/2013	8/15/2014	Gant	\$228,000	\$0	\$0	\$0				
10-8 Phase out the current individual site/building-based voice mail systems and replace with consolidated network-based voice mail across multiple sites.						\$150,000	\$0	\$0	\$0				
10-9 Complete the process, policies, and signed authorization documentation for parent access to the student/teacher portal commensurate with the initiation of access.							\$0	\$0	\$0				
10-10 Review consortium service options (such as those offered via NWOCA) for more cost competitive services and support.							\$0	\$0	\$0				
10-11 Complete the implementation of centrally-managed services, systems management, and remote servicing options.						\$349,000	\$0	\$0	\$0				
10-12 Fund and plan for staff orientation and training costs, including making provision for the dedicated staff time for training and collateral support from the vendors, as part of the initial purchase/negotiations for any major equipment or software system upgrade.							\$0	\$0	\$0				
10-13 Evaluate, update, and standardize the ETRT and DC position job descriptions.							\$0	\$0	\$0				
10-14 Determine the efficacy of the positions of Data Coordinator and Education Technology Resource Teacher positions, and eliminate a minimum of half the positions.						\$2,492,934	\$0	\$0	\$0				
10-15 Submit a single individual Erate proposal for only those school sites likely to be funded at the 90 percent discount level, and submit an additional separate filing for other schools that are close to this level but currently not at 90 percent.						\$1,590,000	\$0	\$0	\$0				
10-16 Clean projector filters on a regular cleaning schedule to extend the useful life of the bulbs.	5/17/2013	9/5/2013	5/17/2013	9/5/2013	Reynolds	\$30,000	\$0	\$0	\$0		This is an ongoing process consistent with building maintenance plans. Full savings or identification of savings may not be possible		
10-17 Develop a process and take steps to ensure timely amending or termination of individual access and authorization privileges relating to secure systems data or programming changes.	4/1/2013	8/1/2013	4/1/2013	8/1/2013	Pregibon		\$0	\$0	\$0				
10-18 Address the specific requirements for, and implement quality of service options with, the district's primary network services/infrastructure providers (e.g. Cisco, Brocade) and implement an improvement plan.	4/4/2013	9/1/2014	4/4/2013	9/1/2014	Pregibon		\$0	\$0	\$0				
10-19 Develop and implement a Preventative Maintenance Checklist as a foundation for a districtwide annual maintenance plan for TPS computers.	4/4/2013	6/22/2014	4/4/2013	6/22/2014	Pregibon		\$0	\$0	\$0				
10-20 Implement a technology equipment disposal process for decommissioning and disposal of unused technology inventory.							\$0	\$0	\$0				
10-21 Implement the Computer Services Help Desk process in the TPS Print Shop for all user requests.	5/3/2013	12/31/2013	5/3/2013	12/31/2013	Pregibon		\$0	\$0	\$0				
10-22 Eliminate one Copier Repairman from the TPS Print Shop.	5/3/2013					\$303,450	\$0	\$0	\$0		A new organizational chart has been designed using information from Evergreen performance audit and Plante and Moran technology assesment.		
10-23 Implement a cap on the total number of prints per user allowed in TPS.						\$229,330	\$0	\$0	\$0				
Chapter 10 Totals	12	10	11	10		\$6,674,064	\$0	\$0	\$0				
Grand Totals	105	101	118	81		\$93,058,780	\$16,738,358	(\$2,273,910)	\$2,005,000				