

## A review of potential collaborations among public school districts

~~~ November 2010 ~~~

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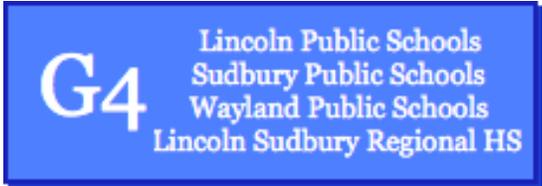
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## **The G4 Mission Statement**

The school districts of Lincoln, Sudbury, Lincoln-Sudbury, and Wayland have formed a working group to expand and formalize efforts to operate in a more streamlined and cost-effective manner. The group entitled G4 is comprised of the Superintendents and a School Committee member from each district.

G4 will consider initiatives that can be launched across districts, and encourage other opportunities of collaboration. G4 will concentrate on saving money and improving services through shared resources and increased coordination. In addition, G4 will share ideas that will enhance the professional development opportunities for staff and the educational experiences for our students. While each district is already involved with established educational collaboratives, this effort is distinct, given the districts' similarities and cooperative efforts already underway.

G4 plans to examine a wide range of topics, including contractual resources, facilities and staff, professional development opportunities, technology, and the general operations of the school districts. G4 will meet throughout the academic year and will generate a broad list of ideas while pursuing a few specific projects with the potential for more immediate impact. G4 will also identify other projects for future consideration.

The School Committee representatives will report on the group's progress regularly at their respective School Committee meetings. School Committee representatives will also provide briefings, as appropriate, to members of their respective Boards of Selectmen and Finance Committees.

## **Introduction**

In February 2009, the superintendents of the Lincoln (LPS), Lincoln-Sudbury (L-S), Sudbury (SPS), and Wayland (WPS) school districts began meeting to explore the notion that collaboration between and among the four districts might save money on operational expenses and/or improve educational offerings throughout the districts. These administrators were aware that the state's economic downturn was adversely impacting their districts and others throughout the state. As the administrative heads of their respective districts, each had been called upon by their school committees to seek out any and all means of conserving resources, slowing expenditure growth, and/or finding new efficiencies in the operation of their districts. While no specific tasks had been assigned to the superintendents, each acknowledged repeated calls by community residents, as well as federal, state and local elected officials, to think more creatively about curtailing annual operational expenses. This task was becoming increasingly more important in light of rising health care and utilities costs, previously negotiated labor increases, and the funds needed to properly implement new state and federal mandated programs and staff training requirements.

In the opinion of the four superintendents, the crisis in school funding was certain to adversely impact the four school districts and their communities. Districts elsewhere were already experiencing fiscal difficulties that necessitated program reductions, staff layoffs, and a growing belief that public schools, in and of themselves, were major contributors to local budgetary structural deficits and rising taxes. For many, the fiscal realities of their town and for their families are taking precedence over supporting the costs of educational programs that already exist.

In a proactive move, the four superintendents hoped to find savings in collaborative activities and the sharing of resources between the districts. Early in their meetings, it was agreed that discussions would be open and wide ranging. All aspects of the schools' operations were subject to review with the hopes that cost savings and/or program improvements would be discovered. Early discussions often turned to whether or not "potential savings" would be returned to their respective towns or used to improve existing programs.

With a schedule established to meet every four to six weeks, the superintendents agreed to expand the group to include a school committee member from each district. As a result the expanded group, now called G4, has been meeting regularly since the summer of 2009. In November 2009, the group formed 14 sub-groups comprised of the appropriate individuals from each district and asked them to explore ideas for saving money or sharing resources and ideas. A chairperson appointed for each subcommittee was responsible for holding a meeting or series of meetings with his or her three counterparts. The subcommittee work began in January 2010. Again, the intent was to foster communications and hopefully discover areas of savings or ideas for program enhancements. The reports that follow represent the work of these subcommittees.

A final word... While a significant savings has yet to be realized by any of the communities involved, the notion of future savings and/or program enhancements and resource sharing has taken root between the G4 participants. There exists today an ongoing dialogue that is focused and mindful of a need to produce results that will prove beneficial to one or more of the communities and the best interests of our students. That

some of the ideas generated by the G4 will be controversial is not unexpected. The financial climate in which our districts operate demands that school and community officials consider options that were previously untenable or contrary to the independent nature of the four districts. To this end, G4 represents an attempt by appointed and elected officials to work together for the betterment of their communities and the individual schools that serve the students of Lincoln, Lincoln-Sudbury, Sudbury and Wayland. Collectively, we look forward to the work ahead and remain dedicated to this task.

### **Summary of Findings**

The G4 Leadership Team identified 14 specialized areas of programming or operations to explore for opportunities for collaboration or sharing of costs or services. District leaders—those who perform similar roles across the districts—were assigned to subcommittees for each functional area. All of the 14 areas involve functions that are vital to effective operation of a public school district and, in some way, support the core mission of the education that occurs in the classroom. Identifying measures that may improve services or may make them more efficient supports the education of the students in our schools.

Each role-alike team met to discuss aspects of their programs or operations with the goal of identifying common activities, current challenges, and opportunities for collaboration. The G4 leaders also brought in S<sup>3</sup>, a consulting group that provides school districts with support and services for shared administrative functions, to assist with the review of payroll operations. The role-alike teams then reported to the G4 Leadership Team using a standardized questionnaire reporting format. The role-alike team leaders also met with the G4 Leadership Team to discuss their findings. The G4 Leadership Team then met to consider which of these functional areas provide the most potential for making changes going forward, which areas require more assessment to determine next steps, and which areas provide the least potential for immediate collaboration at this point.

Even as the districts proceeded with this broader G4 review, three of the districts moved forward in developing a plan to provide shared METCO leadership across the districts. After extensive review and community input, the proposal resulted in a METCO Director position shared by L-S and SPS and reorganization of these district programs. At the same time, other inter-district collaborations or reviews of potential collaborations that had developed outside the G4 role-alike review continued as well. Examples include shared Professional Development planning and ongoing assessment of ways to share Human Resources functions across SPS and L-S. These initiatives, especially METCO, required significant time and focus and indeed may represent the bulk of the consolidation/collaboration done during this time even while this G4 review sought to identify other areas for potential work. The G4 findings are summarized here; individual program area subcommittee reports are provided below.

### **Education Programs – Student Services**

The four districts have many similarities in programming in the targeted educational areas, but the different grade configurations, physical distance between schools, and different calendars and class schedules of the districts provide both challenges and opportunities for sharing services.

*Education for English Language Learners.* The English Language Learner (ELL) programs, which assist students identified as needing this support to access grade-level curriculum, serve a small number of students in each district. The collaboration provided through G4 allows these often isolated educators to share resources and expertise, especially for training and professional development, curriculum units, interpreter services, and for sharing qualified assessment personnel with the districts that do not currently employ such a professional.

*Title I.* Title I programs are funded by federal grants targeted to assist economically disadvantaged students and are subject to strict usage requirements. This support is provided by tutors in each district. Consolidated programming is not feasible within the grant structure, but collaboration may assist in bringing together parents for required Parent-School Compacts or in providing Supplemental Education Services as required for Title I schools that do not meet MCAS improvement targets.

*Special Education.* Special education encompasses a broad range of services from consultation or supplemental therapies to partial or full instruction in special classrooms to placement outside of the district. The G4 districts all participate in special education collaboratives which bring together a large number of districts to provide specialized shared programming. Areas identified for G4 collaboration include professional development, shared contracts for consultants, shared specialized resources, collaboration on hiring and recruitment, and shared specialized programming to meet the needs of low incident student populations or individual students.

*Professional Development.* Professional development for teachers and other staff is crucial to maintaining high-quality education in the G4 districts. Despite budget challenges, the districts seek to allocate needed time and funding to professional development to support and enhance the quality of the instruction. The districts already offer available seats to each other or share programs to reduce costs and increase training opportunities. The districts are continuing to address the challenges of different schedules, distance, and disparate district priorities in finding ways to increase collaboration. Potential areas for sharing courses have been identified.

*METCO.* All districts are long-time, supportive participants in the METCO program, a state-funded grant program supporting enrollment of Boston students in suburban districts. Transportation costs consume a significant portion of the grant funds. The districts work assiduously to ensure success for the student participants within the confines of this tight budget. The G4 districts have aligned their bus contract renewal dates so that they can bid collectively on transportation services and will further explore the sharing of busses or bus routes. Other areas identified for potential collaboration include: sharing of bus monitors and substitutes; mentoring programming; increased clinical counselor support; summer programming; transition planning; and parent education.

In recent years, the funding for this program has been severely constrained, leading the districts to consider different staffing models, including shared staffing, for their programs. The G4 assessment dovetailed with these efforts, resulting in a proposal for a shared METCO Director among the SPS, L-S, and LPS METCO programs. After further review, the plan was revised and SPS and L-S decided to share a METCO Director and reorganize staffing in each program. New staff were hired over the summer and the program changes are being implemented this fall.

## **Technology**

*Administrative Technology.* Technology permeates every aspect of a school district – payroll, transportation, human resources, finance, scheduling, and the ever increasing reporting required by the state and federal governments. As these tasks have mushroomed, the districts have not kept up with needed staffing or hardware and software updates. All districts need to increase capacity in this area, so collaboration should work toward that goal.

To plan for such collaboration, the districts will need to gather additional data beyond the initial G4 task team report about technology use across the districts, including hardware and software details, usage, and staff roles and responsibilities. Possible areas for collaboration or savings include website creation, allowable sharing of software costs, exploration of software services (e.g., Google Apps), and hardware savings (e.g., cloud computing). Further significant efficiencies may require investment in updated technologies.

*Educational Technology.* Each district also uses technology to increase student achievement and technological literacy. The data gathering process will focus on these needs as well. Possible areas for collaboration include courseware delivery, class and departmental website functions, and online instruction (possibly sharing small section courses, such as upper level languages).

## **Operations**

*Grants.* The distinct district structures and the strict requirements for entitlement grants limit potential collaboration in this area. Thus, collaboration is recommended for seeking competitive grants when the districts share eligibility and planned uses for the grant funds. Professional development presents significant potential for shared grant implementation.

*Business and Financial Operations.* The four business administrators share similar responsibilities, but operate within somewhat different structures. The operations of the three districts other than L-S are intertwined with the municipal government administration, especially in areas managed within the MUNIS software platform. The current staffing levels in each business office require the chief business official to complete day-to-day accounting and budgeting duties. All districts participate in larger purchasing collaboratives for energy, classroom, and operational supplies and equipment, and food service supply purchases. The business administrators plan to continue their collaboration, across many of the functions reviewed by the G4, seeking ways to share costs and ideas for more efficient operations.

*Human Resources.* Staffing for HR functions is structured quite differently across the districts. Moreover, each district operates under distinct collective bargaining agreements and the districts use separate personnel data systems. The areas with potential for immediate collaboration include sharing recruitment tools and costs, programs for tracking attendance and substitutes, and shared training and professional development (especially universally mandated training for staff). Expanding on prior work begun by L-S and SPS, these districts, working also with LPS, will pursue the further study of a shared HR department or shared leadership of each district's HR department and function.

*Payroll.* The Payroll role-alike working group worked with S<sup>3</sup>, a consulting group that facilitates shared administrative functions. Each district performs similar payroll functions, but with different structures as three of the districts have operations that are integrated with their respective towns. The consultants determined that consolidation of payroll operations would not necessarily lead to savings or efficiencies; it was reported that automating or streamlining the HR and payroll processes may have the potential for greater savings. Some specific process improvements were recommended.

The working group and consultants also considered coordination in use of a payroll processing vendor. Faced with the need to purchase new software, L-S determined that use of a vendor would be cheaper, not on a cost per check basis, but because the software purchase could be avoided. The group determined that a separate payroll processing vendor would not be cost-efficient for the other three districts at this time, as payroll is part of each town's broader MUNIS package. Nor would it make sense for L-S to purchase MUNIS for payroll purposes.

Town officials must be involved more directly to determine whether there is potential for sharing of functions across town lines, use of outside vendors, or other collaboration especially concerning coordination of MUNIS contracts or support.

*Food Service.* The Food Service Directors manage food services operations, including maintenance of health and quality standards, compliance with state and federal laws (including the federally subsidized meal programs), and catering for school and town functions (in some cases, this includes Council on Aging functions). Unlike the other three districts, which are "self-operated" programs, the L-S program is a contract account managed by Aramark Education K-12. Potential areas of collaboration include: collaborative purchasing of uniforms (food supplies are already purchased through a collaborative); shared training on NutriKids payment system and other professional development; joint menu development; collaborative grant opportunities; shared labor advertising and substitute pool; and general sharing of best practices.

*Facilities and Maintenance.* The facilities function primarily involves custodial, maintenance, and ground operations. These functions are staffed differently across the districts and, in some cases, intertwined with the town governments. Budget reductions have strained the districts' ability to adequately clean and maintain the buildings and to continue energy-saving investments. The sharing of information, best practices, and, occasionally equipment helps to support each district. Consolidated training and procurement may also provide small cost savings and improved services.

*Transportation.* All four districts use bus company vendors to provide regular in-district transportation. L-S and SPS have an integrated bus system and have jointly bid in-town transportation for many years; the school schedules are staggered to allow multi-tier bus routes. The districts will consider the possibility of a three- or four-district joint bid in the future. As the primary costs depend upon the number of buses each day, there are generally not large economies of scale when adding more buses to a contract. Savings would be found primarily in setting school start and end times to allow multiple runs and sharing of buses across the school day (as currently implemented by L-S and SPS). The districts use vendors for out-of-district special education transportation, often as part of larger special education collaboratives.

## Conclusions

The G4 role-alike team review process brought together key staff members across the districts who rarely have the opportunity to work closely, or even communicate, with those in similar roles in neighboring districts as they delve into the details of their operations. The cross-fertilization of ideas and resources and shared best practices has been quite productive in helping personnel think about how best to perform these functions. The hours spent by these key personnel on the G4 review is truly appreciated.

The G4 Leadership team gained significant information and insights from the role-alike team assessments concerning the challenges and opportunities for collaboration and consolidation. This work built on lessons gleaned from other inter-district work to consolidate or share services *and* from collaborations between the school districts and municipal departments.

Examples of work outside this G4 review include an analysis completed a few years ago of the potential for a shared Business and Finance Director between L-S and SPS, occasioned by an opening at L-S. This analysis revealed that the staffing and responsibility assignments that would be needed under the proposed structure would not produce any cost-savings and presented operational deficiencies. A review of the oversight functions for athletics at L-S, LPS, and SPS showed that extension of the L-S Athletic Director responsibilities to the middle schools would not address the respective needs now satisfied more efficiently by stipend-based oversight and would increase costs to SPS. In Wayland, some consideration had been given to a shared model between athletics and the Park and Recreation Department, but the implementation of a shared Park and Recreation Director between Wayland and Sudbury emerged instead while the Wayland HS Athletic Director position was reduced. Both LPS and SPS have worked toward shared facilities management with their respective town departments. The Wayland town departments and WPS recently reorganized their business, payroll, and Human Resources functions to increase the integration between the town and schools.

Based on these various initiatives and the fact-finding work of the G4 subgroups, the districts are better positioned to find constructive opportunities for further collaboration. It is important to note that a refined understanding of the challenges noted here will facilitate more effective and productive efforts to overcome barriers in finding new models of operation.

### *Challenges*

The exploration of true consolidation opportunities highlights the factors that limit wholesale integration of functional areas across district parameters. As public entities, school districts are ultimately subject to separate governing boards that, in turn, are accountable to separate constituencies. Three of the districts also operate, to some extent, as departments of their respective towns, each intertwined with municipal government in different ways. The experience gained through this process indicates to the G4 Leadership Team that *dramatic changes in operational structures may require changes in governance structure*. Moreover, regulatory requirements in many cases dictate separate accounting, reporting, bidding, and program implementation.

Specific examples of structural impediments include grant eligibility requirements, challenges to merging separate software or maintenance contracts, the state

requirements for multiple reports on an individual district basis, municipal and school finance rules (such as those governing revolving funds and grants management), and the oversight and implementation of separate collective bargaining agreements. *The inability to merge these functions limits efficiencies that may be gained by merging the staff.* The S<sup>3</sup> consultants concluded that the business functions within each district have already been squeezed significantly and that further efficiencies may be limited within the current district structure. They further reported that efficiencies in process may provide greater economies than organizational restructuring.

The chief business official, special education director, and in the case of SPS, the human resources director, are part of the districts' management team. This team works closely to identify district goals, strategies and vision. While each has numerous day-to-day duties, they also provide a key leadership role in supporting the superintendent and school committee. *The absence of these roles within a district would further challenge the larger leadership needs in each district.*

Discussions with the staff members who collaborated in the role-alike working groups were telling in how *structural and physical differences were perceived to create barriers that made consolidation of services either not feasible or not beneficial.* The physical distance between districts or schools, the variance in school calendars, and the very disparate school day times often prevented even those sought-after sharing opportunities. For example, when SPS and LPS identified very high performing middle school math students who required math instruction beyond the middle school curriculum, rotating schedules, class times and distance impeded the opportunity to jointly create a program for these students.

*Differences in school district and community identities, cultures, and priorities also shape the potential for shared or merged enterprises that are meaningful for each district.* Each district brings a distinct vision of education and a set of goals that dictate the direction of any shared goals and determine which initiatives are appropriate for investment of limited time and resources. Even when a high desire to collaborate exists, for example, in Professional Development, different curriculum programs, instructional needs, or technologies may drive the needed programming.

The transition to the shared METCO Director provides a model of the challenges presented with the melding of different town and school cultures and oversight by multiple independent school committees. Despite what seemed to be significant cost reallocation from administration to student support, the opposition to change was profound. The shared METCO Director is running two district programs and reporting simultaneously to two separate supervisors. Successful implementation will require careful review of how best to accommodate the needs of each district as the Director remains accountable to each. However, this model also exemplifies the potentially considerable educational advantages gained by viewing the programs from a K-12 perspective and enhancing the transitions and the continuity of student and parent support across the grades.

### *Opportunities*

Despite the hurdles noted, the districts are working hard to identify those areas where consolidation or sharing makes the most sense. *The areas with greatest potential for immediate impact tend to be those areas where the sharing of information, materials,*

*expertise, equipment, or staff may add capacity to the function in each district.* Examples include shared training and professional development programs, the sharing of interpreters for ELL or ASL students, shared contracts for consultants such as a pediatric psychiatrist, and the sharing of maintenance staff with particular trade licenses, certifications, or expertise. (An example of the “mutual aid” that may occur across districts occurred when flooding resulted in 8 feet of water in the LPS boiler room and the L-S maintenance staff delivered much-needed pumps that were in short supply at that crucial time.) Technology provides a fertile area for potential to leverage expertise or support across the districts.

*Moreover, the districts will continue to focus on those areas where shared models provide economies of scale and where separate contracts or operations are not dictated.* In many cases (such as special education and joint purchasing of energy, classroom supplies, and food supplies), the districts already take advantage of larger collective efforts. Examples of potential G4 shared services include low incident student groups who can come together, such as high school classes that might be offered online, shared summer academic programs for METCO students, after-school programs, adult and community education classes, or in collaborating on the initiatives and mandates associated with the federal Race to the Top grant. Training and professional development and joint recruitment efforts certainly provide greater potential for cost-sharing than has been realized. Bus service, on the other hand, represents an area where prior experience indicates that contracting for more busses may not significantly reduce the cost per bus each day, although further research will be conducted.

*Further collaboration with the town municipal departments provides an area of great opportunity.* Of course, business functions and technology are prime targets for resource sharing. The school-town shared facilities function is, in some instances, ripe for advancement. Community educational programming in the broadest sense provides interesting prospects for collaboration, given the various offerings in the arenas of Adult and Community Education, after-school care programs, after-school activities, Park and Recreation programs, and Council on Aging programs.

*Finally, the districts also have greater opportunities to leverage their resources in those areas where shared learning and resources help to decrease the learning curve for that function or a district’s model or approach may be replicated elsewhere.* Specific program areas, such as ELL instruction, will benefit from collective work on curriculum and instructional practices. In-house training or curriculum materials may be shared or jointly developed. For instance, LPS recently provided the other districts with its locally-developed training modules for staff training in mandatory annual training content areas.

## Next Steps

The next phase of the G4 work will focus on a few specific initiatives, so that time and energy will be targeted to advancing areas with potential for benefits. At the same time, the G4 Leadership Team will continue to meet and discuss other areas which may have potential for development into concrete proposals. The Leadership Team understands that given the current workloads of administrators and staff, change must be focused on a few initiatives that present an opportunity for savings or improved service.

The G4 Leadership Team will next report to their respective School Committees to inform the Committees of these findings and to gather input concerning the next steps and the future direction of the G4. The G4 leaders also will engage Town leaders and staff in further discussion especially concerning operational areas intertwined with Town functions. Town leaders will need to ascertain their potential for providing support for these initiatives given other priorities. The Superintendents will arrange a meeting with the respective Town Managers and other relevant staff. The report will be distributed to the Boards of Selectmen and Finance Committees for input and also will be shared broadly within the communities.

The school districts and, in some instances, other town departments will need to invest significant resources of time and money to advance larger initiatives. The short-term efforts are important even if the gains are smaller. Larger and long-term gains will require short-term costs. School Committee consideration and support are crucial in determining the priorities and the investments that districts will be able to make in these efforts.

The recommended primary initiatives are as follows:

- (1) Professional Development. The districts will continue with the ongoing shared Professional Development opportunities and plan for other shared programming. Districts have already aligned calendars to facilitate this work and have identified areas for summer programming.
- (2) METCO. As L-S and SPS continue their work in implementing the shared Director model, review of the results will help in understanding whether this model may be extended beyond these districts or may be adopted in other program areas. In addition, the four districts of L-S, LPS, SPS, and WPS will pursue joint bidding for METCO bus services.
- (3) Payroll. This is an area targeted for short-term exploration to determine potential for future structural changes. Collaboration with Town staff and officials and insights gained from the L-S experience with a payroll vendor will be key to this exploration. Other short-term endeavors will address increased automation of the functions.
- (4) Human Resources. The districts of L-S, LPS, and SPS will engage in analysis of potential shared functions or staff for Human Resources operations. This district will build on lessons learned from the recent integration of the HR functions between WPS and the Wayland town departments. Given that this function is intertwined with the implementation of separate union contract obligations as well as individual district policies, further assessment including School Committee consideration of this initiative is important in defining the next steps.

(5) **Technology.** The Administrative and Educational Technology areas provide fertile ground for collaborative work that could substantially impact operations and services. The ability to access and implement technological improvements is vital to effective and efficient operations and to enhancing student learning, yet, for some districts, investments in this area have fallen far short of meeting the districts' needs.

The short-term work in the area would involve an inventory of the available resources across the districts to better understand the current status of technology use and shared and common resources. In addition, the G4 leadership team will explore models of cross-district technology collaboration that have been successful and begin exploratory discussions with consultants who have expertise in such endeavors. The long-term work would require the use of a consultant or other supports to provide expertise and capacity not available in the districts. This will be a cost to the districts and needs to be incorporated into budget planning. Additional staffing may be needed as well. Nonetheless, these investments, if feasible at this time, have the potential for long-term benefits that would be leveraged given the reach of technology across all of the areas addressed in this report.

|                                 | <b>Short-Term Initiatives</b>                                                                                                                                                                                                                                    | <b>Long-Term Initiatives</b>                                                                                                                                                                    |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Professional Development</b> | Continue to share programming opportunities.                                                                                                                                                                                                                     | Explore further ways to share costs of programming. Continue to align calendars to maximize opportunities.                                                                                      |
| <b>METCO</b>                    | Review results of SPS/L-S collaboration.<br>Pursue joint bus contract.                                                                                                                                                                                           | Decide whether the model should be expanded to other districts.                                                                                                                                 |
| <b>Payroll</b>                  | Along with town officials, explore feasibility of structural changes. Address increased automation of functions.                                                                                                                                                 | Potential structural changes.                                                                                                                                                                   |
| <b>Human Resources</b>          | Analysis of potential shared functions or staff for Human Resources operations.                                                                                                                                                                                  | Consider options along with all School Committees.                                                                                                                                              |
| <b>Technology</b>               | Inventory the available resources across the districts. The G4 leadership team will explore models of cross-district technology collaboration that have been successful and begin exploratory discussions with consultants who have expertise in such endeavors. | Hire a consultant, additional staff or other supports to provide expertise and capacity. Include costs in local budget planning. Continue to invest in software, hardware, staff, and training. |

|                                   | <b>Short-Term</b>                                                                                                                                     | <b>Long-Term</b>                                                                                                                                                       |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Process and Implementation</b> | Meet with School Committees to approve recommendations and set priorities.<br>Meet with Town staff and officials to determine Town support and roles. | Integrate priorities into district goals.<br>Develop action plans.<br>Include costs in local budget planning.<br>Hire consultant, staff, or other supports, as needed. |

## **Education Programs - Student Services**

### **English Language Learners**

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#### Introduction

An English Language Learner (ELL) program assists students whose first language at home is not English. To ensure success in school, students are supported in language development, particularly in listening and reading comprehension, and language production - speaking and writing. The ELL Task Team was comprised of four educators from Lincoln-Sudbury Regional High School, Sudbury Public Schools, Wayland Public Schools, and Lincoln Public Schools. The group met twice during the winter of 2010 (on January 15 and February 1).

#### Functions

ELL instruction is provided to students in G4 districts who have been identified as needing this added support in order to access grade-level curriculum. Our ELL educators are responsible for:

- Identification of new students needing ELL services to realize success
- Notifying parents of their student's eligibility
- Determination of the service model that is required (pullout or inclusion)
- Delivery of ELL services to the student
- Ongoing communication with ELL parents
- Conducting annual district and state assessments of students
- Coordination of state-level (SIMS) data about progress of ELL students
- Maintaining student files
- Participating in annual decisions for continued ELL support or termination of support
- Monitoring former ELL students for two years after active ELL support services have been terminated
- Staying informed of Massachusetts Department of Secondary and Elementary Education regulations regarding ELL students
- Participating in area collaborative programs around ELL students issues

#### Town-Level Issues

Of the four G4 districts, Lincoln Public Schools has by far the largest ELL population, both in size and percentage of the overall student body, yet these numbers are negligible compared to urban districts like Boston, where nearly one in five students is ELL.

Lincoln Public Schools has a total student population of 1,200 PreK-8. Lincoln's ELL population is 32 students (2.7% of the total enrollment). Lincoln's ELL staff is

comprised of 2.0 FTE teachers supporting students in 15 home languages, including Chinese, Mandarin, Turkish, Tagalog, Korean, Bangla, Hungarian, Japanese, Hindi, Romanian, Dutch, Armenian, German, Cantonese, and Spanish). The high turnover rate of households on the Hanscom Air Force Base causes the number and home languages of ELL students to change unpredictably.

Wayland Public Schools has a K-12 enrollment of 2,719 students K-12. Wayland's ELL population is 18 students (0.66% of the total enrollment). ELL staffing (0.5 FTE) supports these students, who come from households speaking five different languages (Russian, French Congo, Korean, Chinese, and Spanish). The Wayland ELL teacher travels between three schools – the high school, middle school, and a single elementary school designated for ELL students.

Sudbury Public Schools has a total student population of 3,176 students K-8. Sudbury has 16 ELL students (0.5% of the total enrollment). Sudbury services these 16 students with an ELL staff of 1.5 FTEs, who support students speaking five home languages (Spanish, Portuguese, Turkish, Farsi, and Chinese). Sudbury ELL teachers are responsible for delivering these support services at two to three different schools.

Lincoln-Sudbury Regional High School has a total enrollment of 1,612 students 9-12. Lincoln-Sudbury has only 4 ELL students (0.2% of the total enrollment). Lincoln-Sudbury services these four students with a half-time ELL teacher and a tutor. The native tongue for these students is Dinka, Korean, or Punjabi. All Grade 9 students new to the district take a home language survey to assess whether there may be an ELL need, and follow-up screening takes place based on the survey.

#### Possible Areas for Collaboration

The small number of ELL students in G4 districts means that the ELL staffing is also small, frequently without peer support within a school. Collaboration through this G4 process has allowed isolated educators to connect with “role alike” peers in neighboring districts. The advantage has been to foster collaboration and connection where it may not have previously existed. In the end, a sharing of resources and ELL educator expertise may better serve students in each district.

One ELL teacher in Sudbury and a second in Lincoln have become Massachusetts English Language Assessment-Oral (MELA-O) trainers. MELA-O is the assessment that is used to evaluate the English speaking and listening skills of limited English proficient (LEP) students. All LEP students in Massachusetts must be administered the MELA-O by a qualified MELA-O administrator each year. These MELA-O trainers could share their expertise with colleagues in other G4 districts, if ELL teachers lack this requisite training.

Both Lincoln's ELL teachers have experience with the Rigby READS (Reading Evaluation and Diagnostic System), which could be shared and conveyed to peers in other districts. Likewise, the Lincoln-Sudbury ELL teacher has developed and can share curriculum units and a form for monitoring Former Limited English Proficient (FLEP) students for the two years after they have been determined to no longer need ELL services.

Intra-district funding of professional development opportunities for G4 ELL teachers would help support future collaboration so that educators could share strategies in both

assessment and teaching. Having common professional development times across the districts might also help facilitate intra-district collaboration. ELL students may benefit by meeting peers in other districts, in order to build a larger peer base in schools where the vast majority of students speak English as a first language.

Collaboration with area peers also helps ELL teachers surmount challenges with translation and interpretation services, which are occasionally needed to make inroads with parents and students.

Lastly, there is realistic potential for savings through collaboration around the training required for all teachers who serve students in their classrooms for whom English is a second language. The Department of Elementary and Secondary Education requires that classroom teachers be trained in at least Category 1 (of four levels) in techniques for instructing ELL students. Funding and classroom coverage issues make it very difficult to send large numbers of teachers for training annually, despite the fact that students encounter new teachers each school year. There is likely an economy to be achieved by merging district efforts in hiring instructors and offering the training locally (versus sending people out for outside conferences individually) for large numbers of faculty with similar needs, perhaps during the summer months. Since ideally the DESE would like as many faculty as possible trained in all four levels of instructional techniques, each district could make more progress at less cost than presently possible if opportunities to collaborate are used.

## **Title I**

Joanne Delaney - Lincoln-Sudbury Regional School District  
Bob Milley - Sudbury Public Schools  
Stephanie Powers - Lincoln Public Schools

### Introduction

The Title 1 Task Force Team was comprised of three educators from Lincoln-Sudbury Regional High School, Sudbury Public Schools and Lincoln Public Schools. The committee did not include Wayland Public Schools because it was informed that they do not have a Title 1 program.

Representatives from Lincoln-Sudbury and Sudbury met on February 24<sup>th</sup>, 2010, and a subsequent meeting was held with Lincoln in early March.

Under the No Child Left Behind Act of 2001, Title I is the largest federally funded educational program authorized by Congress. Its mission is to provide supplemental funds to school districts in order to assist in meeting the educational goals of disadvantaged students experiencing poverty. Based on a funding formula that directs the majority of funding to districts with high poverty rates, any district with at least 10 children or 2 percent of its student population in poverty (according to free/reduced lunch criteria) is entitled to Basic Title One Funds. Lincoln, Sudbury and Lincoln-Sudbury all receive some, albeit limited funding under Title I.

Title I programs provide funds to districts in order to assist schools in meeting the following goals for economically disadvantaged students:

- Improve student achievement for all participating children, as measured by the MCAS test scores.
- Improve staff development in serving Title I students.
- Improve the parental involvement of Title I parents in their children's education.

In accordance with Federal Law, funds are allocated directly to schools for these purposes and districts are prohibited from using Title I funds to offset expenses that would normally be paid by other sources if Title I funding was not available ("supplement, not supplant requirement").

Several policies and procedures are required of the district when it agrees to accept Title I funds:

- Only staff who meet "highly-qualified" standards dictated by the grant may be hired for Title I programs.
- Districts must report all activities intended to be funded by the grant for approval before funding is provided.
- Districts must identify the students who receive services according to specific requirements, measure improvement on student MCAS testing, and maintain records of student participation in Title I activities.
- Districts must provide periodic documentation regarding its use of funds at several points of the year.

## Functions

The Title I funding for each district is minimal, compared to more urban districts where most Title I federal money is directed. Sudbury receives approximately \$75,000, Lincoln receives approximately \$33,000, and Lincoln-Sudbury receives approximately \$36,000. In Sudbury, Lincoln, and Lincoln-Sudbury, Title I money is used for staffing tutors during the school year. Lincoln's Title I funds are in the form of targeted assistance and directed primarily at the Hanscom schools' program. The money is used to hire tutors during the summer months at the Hanscom Air Force Base schools. In Lincoln, some Title I money is also used for professional development.

In all three districts, distribution of tutors among schools is prescribed by Title I grant rules, according to students' low-income criteria. There is no flexibility in where the tutors can be used.

In all three districts, Title I funding has steadily decreased over the last several years and is at a low-enough level that it can only fund tutors and cannot sustain a teacher in any given school building. Funding amounts are determined by the number of students on free or reduced lunch lists.

All three districts serve students according to a rank order list as prescribed by the Title I Grant. The grant prioritizes services based on a weighted-point scale, according to failures on the MCAS exam, teacher recommendations, etc. Sudbury also uses some standardized testing to prioritize which students will receive Title I services.

## Town-Level Issues

The assistant superintendent manages Sudbury's Title I program. Lincoln and Lincoln-Sudbury's programs are administered by the directors of student services. All three individuals have job descriptions that share an "umbrella" of oversight of multiple educational support areas.

Sudbury only provides math-tutoring services to students with Title I money. Lincoln and Lincoln-Sudbury provide both mathematics and English Language Arts tutoring under the Title I grant.

Unlike Lincoln and Sudbury, which must follow tight grant restrictions on which schools receive Title I support and how much of it, Lincoln-Sudbury benefits by being a one-school district. The Title I dollars that come into Lincoln-Sudbury do not get further subdivided among multiple school buildings.

Because Title I money is directed towards economically disadvantaged students, there is a perceived stigma attached to Title I services in G4 school districts. In communities where there is an abundance of wealth, some families often do not want to avail themselves of Title I service. It is often difficult to get parents to attend parent meetings or events that carry the Title I stigma, making it difficult to address the "parent participation" requirements of the grant.

## Collaboration That Could Save Money

Bringing Title I administrators together was beneficial in that it enabled “role alike” individuals to meet face-to-face and engage in thoughtful dialogue. At a minimum, this newfound collaboration will facilitate the sharing of forms required for Department of Elementary and Secondary audits and those required to satisfy grants, but there are some possibilities for further sharing.

One requirement for Title I money is a Joint Parent-School Compact, outlining how the parents, the entire school staff, and the students will share in the responsibility for improving students’ academic achievement. This means that the school and parents need to develop a partnership that will help children achieve the high standards specified under the Title I grant. The pool of parents available to be part of the “Compact” is limited in any of our more economically advantaged districts. Add to this the stigma associated with Title I. Together this creates an administrative challenge in mustering a parent group for the “Compact” required to satisfy the grant and the state’s Department of Elementary and Secondary Education. Uniting our communities to form a group that would be a Joint Parent-School Compact would be mutually beneficial.

Should any district not meet the Annual Yearly Progress (AYP) specified under the Title I grant, that district would be required to provide Supplemental Education Services (SES) – even if the district only fell short of AYP for students in a particular subgroup. SES are additional academic instruction provided outside of the regular school day and designed to increase the academic achievement of students attending schools not meeting AYP goals. Presently, Lincoln is required to provide SES to its Hanscom schools. The Title I administrators who collaborated as part of the G4 process felt the schools should consider a collaborative effort for addressing the need for SES programs, and potentially creating a central SES Center to provide the mandated tutoring. Creative collaboration on SES could save money in planning, transportation, and staffing.

Unfortunately, the excessive rules and restrictions built into the grant dictating the use of Title I funds prohibit any consolidation of services. In our districts, the Title I grant does not pay, in whole or in part, any administrators’ salaries, so combining administrative function of Title I grants would have no cost savings. Title I requires each district to report how it distributed the funds to each school according to a very tightly prescribed formula, and its individual, district-specific reporting requirements, prohibit intradistrict collaboration or merging of Title I funds.

## **Special Education**

Joanne Delaney - Lincoln-Sudbury Regional High School  
Deborah Dixon – Sudbury Public Schools  
Stephanie Powers – Lincoln Public Schools  
Marlene Moskowitz-Dodyk - Wayland Public Schools

### Introduction

In Massachusetts, public schools are required to provide special education services in compliance with federal and state special education laws and regulations. These requirements mandate the development of Individualized Educational Plans (IEPs) for students with disabilities who also require specially designed instruction.

Special education services are provided by highly-qualified faculty who collectively possess a comprehensive repertoire of knowledge, experience and skills. Special education faculty includes special education teachers, occupational therapists, physical therapists, speech and language pathologists, social workers, school psychologists, and tutors. All are appropriately licensed and are trained in research-based, instructional strategies, assessment and specially designed curriculum.

The range of special education services provided by the G4 districts includes consultations to parents and general education teachers, short or longer-term therapies or related services (Adaptive Physical Education, Assistive Technology, Behavior Therapy, Counseling, Hearing/Audiology Services, Health Services, Occupational Therapy, Physical Therapy, Social Skills/Pragmatics Instruction, Specialized Transportation, Speech and Language Therapy, Vision/Orientation and Mobility Services), counseling, direct instruction in an inclusive setting or separate classrooms, and placement in collaborative programs or private school settings as either a day or residential student. Short-term interventions for students unable to attend school are also provided in the form of tutoring at home or in a hospital setting. Special education programs may be delivered during the school year or on an extended-day or extended school year schedule, as determined by the IEP team.

Individualized, student-centered special education services are cooperatively developed by an IEP team, which includes parents, general education and special education teachers, administrators, and, when appropriate, other specialists. These teams make every effort to provide appropriate special education services to children in a setting as close to the general classroom as possible. When students require services beyond the capacities of the district community and staff, the district hires consultants and experts to collaborate with the schools or seeks special education placement out of the district. The district offers a broad range of options, which progress from inclusive, i.e. consultation in the general education classroom, to segregated, i.e. placement in a residential school. This is commonly referred to as the "continuum of services" in the field of special education.

A school-based team of professionals who examine formal, informal and curriculum-based assessment data determines eligibility for special education. Eligibility for special education is based on the presence of a disability that results in the student not making effective progress as well as need for specially designed instruction. Specially designed

instruction may include content, methodology or performance assessment that is different from what is available through general education. Not all students who are referred to special education reach the rigorous eligibility criteria. When this occurs, the general education faculty monitors the students and supports are put in place through general education to meet their social, emotional and academic needs.

### Areas for Collaboration

Members of the G4 Special Education Team discussed all aspects of the special education function and identified several areas for collaboration. These include professional development for faculty and para-professionals, shared contracts for consultants, shared specialized resources personnel, collaboration on hiring and recruitment and shared specialized programming to meet the needs of low incident student populations or individual students.

Some of the specific collaborations that have resulted from the G4 effort include:

- All G4 districts have a registered American Sign Language (ASL) interpreter in common; this collaboration meets the DESE requirement and provides ASL services at a lower hourly rate.
- LPS and L-S share the cost of a contract with a pediatric psychiatrist who consults to both districts six to ten times per year.
- LPS and L-S share the cost of an annual subscription for Project INTERFACE, an initiative to improve the integration of mental health and wellness services within school systems and their greater community. The primary goal of Project INTERFACE is to enhance, improve, or develop collaborative efforts between school-based mental health and wellness services and community mental health and wellness systems and services. Project INTERFACE is a web-based service of information and provider contact. It also provides live support via phone service.
- Collaborative purchasing for assessment materials at more competitive rates.
- Each district has also agreed to share staffing with specialized expertise to address unique program needs on a short-term basis.

## **Professional Development**

Leslie Belcher - Lincoln-Sudbury Regional High School  
Brad Crozier – Wayland Public Schools  
Bob Milley – Sudbury Public Schools  
Mary Sterling – Lincoln Public Schools

### Introduction

Professional development is critical to supporting teachers in their work with students and each of the G4 districts makes a considerable effort to offer high-quality professional development for their faculty and staff. Each district has a central office administrator who has as a primary responsibility planning and coordinating professional development activities. Mary Sterling, Assistant Superintendent, Lincoln Public Schools, Brad Crozier, Assistant Superintendent, Wayland Public Schools, Bob Milley, Assistant Superintendent Sudbury Public Schools and Leslie Belcher, Curriculum Coordinator for Lincoln-Sudbury Regional High School lead the efforts to both improve educational programs and to provide for the continual learning of the faculty. Having these two functions under the leadership of the administrator responsible for educational programming serves to ensure strong alignment and targeted professional development for teachers.

### Opportunities for Collaboration that may either Save Money or Improve Program

Each district allocates resources in the form of time and funding to support professional development. This function is an area in which district should be able to collaborate by sharing offerings and cost, especially for large scale initiatives that align with multiple districts' needs or for targeted professional development for departments with few faculty.

There are several challenges to successful collaboration. These include alignment of district goals and resultant needs for professional development; daily schedule and annual calendars and geography. For example, the time required to have teachers travel to sites outside their district makes it harder to work together during the school day.

Several areas which lend themselves to sharing have been identified and include: teacher induction and mentoring, training in English Language Learner programs, assessment strategies, efforts to narrow achievement gaps, the use of data to inform instruction and improve learning and co-sponsoring of courses or workshops during the summer.

Lincoln and Sudbury both use the same middle school math consultant and should consider ways to share cost for services.

The assistant superintendents have discussed common scheduling of two courses/workshops, which could be offered to teachers in the G4 districts next summer. These are a course on Differentiated Instruction in middle and high school classes and local sponsorship of Research for Better Teaching's Studying Skillful Teaching course.

The districts have agreed to offer available seats, either at no cost or reduced tuition, in any of our professional development programs to G4 districts. These include Lincoln's

Responsive Classroom workshops, Wayland's Literacy Institute, Sudbury's effort in RTI in grades kindergarten to two and Kathy Richardson's math assessment program or Lincoln-Sudbury's work with Visions, a program for multicultural awareness.

Each of the districts has already included peers from the G4 districts in on-going activities and future collaboration in the area of professional development is highly recommended and could meet both of G4's goals – improving programs and saving money.

## **METCO**

Leslie Belcher - Lincoln-Sudbury Regional High School  
Christina Horner – Lincoln Public Schools  
Bob Milley – Sudbury Public Schools  
Stephanie Powers – Lincoln Public Schools  
Kimberly Donald - Sudbury Public Schools  
Nicole Stewart - Lincoln-Sudbury Regional High School

### Introduction

All districts are long-time, supportive participants in the METCO program. METCO is a state grant-funded voluntary desegregation program where students from Boston are enrolled in suburban school districts. All in the G4 districts participate. Prior to the 2010-2011 school year, each district separately employed a director and staff to provide a program for students in the respective district. Approximately 375 students attend the G4 schools as part of the METCO program. Like most state programs, funding for the METCO program has been severely constrained over recent years. In the last two years, the METCO grant has been cut approximately 5% each year.

### Opportunities for Collaboration that may either Save Money or Improve Program

Transportation costs for home-to-school bussing plus for special activities is a significant percentage of the total METCO budget. These costs are increasing annually. Currently, each district contracts for bussing services either through METCO, Inc. or directly with a transportation provider. The G4 group recommends that bussing contract renewal dates be brought into synch and that the G4 districts go out to bid collectively for METCO transportation services at the earliest possible date. Further consideration should be given to sharing special transportation routing (late busses, activity busses), if possible, to share busses and therefore costs.

Recruiting and retaining bus monitors is a recurring problem for each district. It is recommended that the districts develop a pool of possible bus monitors and possible substitute bus monitors. This may also include sharing opportunities for providing mid-day duties for the monitors (unassigned time between the morning run and afternoon run).

Mentor programs for students have shown to be effective in supporting students and providing role models of color for the students. It is recommended that G4 districts develop a partnership to design and implement a mentoring program in which each Boston student has a least one adult in his/her school to regularly connect with and to offer support or advice in a problem situation.

It is recommended that hiring two clinical counselors of color would effectively serve and support Boston students in all G4 districts in a manner which is primary to, but supplementary of, the services of METCO, Inc.

Summer opportunities have also proven successful in keeping students engaged and minimizing the “summer slide” that often happens for students. These programs are quite expensive to sponsor but collaboratively offered would be more cost effective. The

suggestion is to develop summer academic preparations programs to be offered in Boston. It is likely that tuition would have to be charged. In the past, Lincoln has operated Project Jump Start, a remediation/enrichment program for early elementary students. This program was offered on the Lincoln School campus and other METCO districts tuitioned some of their students into the program. Restarting this program might be feasible if done on a collaborative basis.

Offering and promoting partnership programs centered on the arts could bring students in the G4 districts together around common interests and pride.

Great collaboration around efforts to transition middle school students to high school and elementary students to middle school would allow improved programming and results. Building in shared special events to the transition programs would be motivational and encouraging.

High quality parent programs and activities, with well-known presenters/facilitators, could be offered annually to G4 families. These programs are more feasible if offered as G4 collaboration.

Wayland has been very active and effective in fund-raising to support the METCO program. Sharing experiences and opportunities around fund-raising across the G4 may help mitigate the grant reductions.

#### Post Comment

The SPS, LPS and L-S districts have agreed to do further analysis of the benefits and challenges inherent to collaborating to procure METCO transportation services, and will create an action plan for procurement.

Since the development of this report, SPS and L-S with a combined total of 150 Boston students, have entered into an agreement to share a METCO director. Cost savings and efficiencies from this new structure will be maintained within each district's program and will allow the district to redirect more funds directly to the support of students in the classroom. The extent to which this type of collaboration can be expanded to other positions or to include other G4 districts is unclear and will require further study.

## **Technology**

### **Administrative Technology**

Carolyn Cullinane – Lincoln Public Schools  
Joe Dearden – Lincoln Public Schools  
Nancy Errico – Lincoln-Sudbury Regional High School  
Michael O’Brien – Sudbury Public Schools  
Leisha Simon – Wayland Public Schools  
Dave Walsh - Lincoln-Sudbury Regional High School  
Seth Weiss - Lincoln-Sudbury Regional High School

### Introduction

The Administrative Technology functions can be classified as: (i) services that are essential to district operations, (ii) services that are supplementary but are necessary due to federal and state requirements and guidelines, and (iii) technical tasks that must be done to provide both the above services. We will present these functions in detail, mention some of the issues, and explore opportunities for collaboration.

### Functions

#### Core Services

The core service is to provide an information management system necessary for the operation of the school district. Some of the constituent activities are: internal and external communication, ready access and storage of operational and financial data; and student scheduling and information (including support for college applications for high school students). These activities are supported by a variety of databases, maintenance of effective access and sharing of data, email systems, and district websites.

#### Supplementary yet Necessary Services

To support federal and state government guidelines and requirements, the districts must gather and report data. For the federal government, this includes Title I, free and reduced lunch eligibility, and data related to the “No Child Left Behind” law. For Massachusetts state government, several reports about the districts' finances, staffing and student performance need to be reported to the Department of Elementary and Secondary Education (DESE).

#### Technical Tasks

These include maintaining servers and desktops, computer networks, databases, and software. Students and staff need support in their daily use of technology. Existing hardware and software require maintenance, and also need regular upgrades and replacing as necessary. In order to both maintain and upgrade, districts must make purchasing decisions.

## Issues

DESE reporting requirements have increased. Yet, some of the hardware and software has not been upgraded or replaced even as the demand surpasses capacity. In addition, technology staffing in districts has not kept up with responsibilities.

## Collaboration

There are three main areas for possible collaboration: (i) the districts can periodically share their experiences and best practices, (ii) purchasing information regarding hardware and software can be shared, and (iii) there can be coordination in training and professional development.

## G4 Analysis

Administrative technology permeates every aspect of a school district – payroll, transportation, human resources, finances, scheduling and so on. Because it is so pervasive, there are real possibilities for effective collaboration and a thorough review and planning is crucial.

One goal can be to direct the efforts and time of the staff, across all school districts, towards the core and necessary services while reducing their time spent on routine maintenance. The principle is to let loose the talent, training and experience of the staff in areas that directly impact and benefit the core educational mission of the districts. Strategies are needed to achieve this goal in an effective and efficient manner while not compromising on the quality of services.

To plan such collaboration, data that we already have should be gathered in a uniform format. The data could include: (i) the number, type and usage of computers and servers, (ii) an inventory of software details, (iii) maintenance contract information and (iv) the roles and responsibilities of staff. Armed with this data, we can effectively plan in areas that would benefit from coordination.

The following are some ideas for consideration. Where possible, an example or two is given for illustrative purposes.

Explore program improvements. Examples: (i) district website creation: the districts can collaborate and share designs and templates; (ii) exchange of best practices: schedule periodic meetings between the technology teams in order to share good ideas.

Explore cost sharing. If we discover that the same software is being used across all the districts, then engage the vendor in approaches to sharing the costs.

Explore cost savings in software. Example: software as a service – some organizations have moved from Microsoft Exchange mail servers at the back end to Google Apps (saving about \$100K). This does not affect the front end, which the user sees, which can be Microsoft Outlook, or any other mailer program. Email is used as just one example, but other opportunities could exist. We can do this better if we have a full inventory of all software.

Explore cost savings in hardware. More and more governmental and commercial organizations are moving toward server virtualization and cloud computing – the basic ideas being that a given hardware can be made to support multiple servers (virtualization) and where possible computing and data are viewed as a service rather than a resource that must be constantly tended. There are real issues of ease of access, reliability, and confidentiality that must be addressed. Again, this discussion will benefit from a full inventory of hardware.

## **Educational Technology**

Donna Criswell - Lincoln-Sudbury Regional High School  
Nancy Errico - Lincoln-Sudbury Regional High School  
Cindy Matthes – Lincoln Public Schools  
Leisha Simon – Wayland Public Schools

### Introduction

The primary goal of Educational Technology departments in the school districts is to increase student achievement and technological literacy by supporting staff and students in their use of technology. To this end, the districts develop a Technology Plan and monitor technology access and report on the districts' progress.

### Functions

The various tasks the departments perform are: direct student instruction, use of technology to integrate curriculum with instruction, creating a technology plan and vision, professional development, pursuing grants and funding opportunities, purchasing hardware and software, create and maintain acceptable use policies and providing support for course web sites.

### Issues

Wayland is moving away from a Mac platform whereas the other three districts predominantly use Macs. The specifics of a platform is no longer a major issue but has some implications in terms of support and maintenance.

### Collaboration

Sudbury, Lincoln and Wayland K-8 and L-S and Wayland high schools can share their respective best practices for the relevant student age groups. Information about technology problems and their solutions can be shared across the districts. By sharing such information, the districts can not only be more effective but also reduce expenses (for instance, by not hiring an outside consultant).

### G4 Analysis

Even though Administrative Technology and Educational Technology have different purposes, they can be similarly analyzed because their operational details are similar. Please read the Administrative Technology summary report first.

Here also we need to gather data about the computers, software, maintenance and staff roles. Given this data, we can find areas of effective collaboration.

In terms of program improvements, we can (i) collaborate about courseware delivery (syllabus, reading material, homework, feedback to students, grade distribution, course discussion groups) in a secure manner, (ii) collaborate regarding class and departmental

website creation and maintenance, and (ii) share best practices in these and other areas by meeting periodically.

We could follow similar cost savings measure as are outlined in the Administrative Technology report.

There are other areas that are specific to Educational Technology that could be explored.

One is to explore teaching via the web where it is appropriate for the course and the students. For example, a third or fourth course in a particular language would have smaller class sizes. So, we could have one teacher for the course, that is cross-listed at Wayland HS and L-S, who is in the classroom at each campus in alternate weeks and the remote students follow the instruction over the web for that week. This way we would not be eliminating courses (with smaller sections but academically important) due to financial constraints and the teachers could be effectively deployed. We could start a pilot program in one course and work out the details. Similar examples can be found at different grade, course and student levels.

Another area where collaboration in Educational Technology is effective is to apply for grants and funding in a combined manner. By pooling the needs, where appropriate and relevant, the grant application could be comprehensive and cover more areas thereby increasing the odds of securing the grant.

These are a few areas to consider. More areas can be identified as we progress along this path. Through collaboration in this vital area of instruction, the benefits that accrue to each of the districts are immense.

## Operations

### Grants

Brad Crozier – Wayland Public Schools  
Bob Milley – Sudbury Public Schools  
Mary Sterling – Lincoln Public Schools

### Introduction

The representatives from each of the G4 curriculum offices met to discuss professional development, curriculum, and the possibility of working together on grants. Although the administrators share similar titles, the organizational structure and responsibilities are very different amongst the four districts. In some cases the administrators have direct oversight of the grant process and in others cases the administrator serves as a support or resource in the grant process. The context of each district is also very different as the G4 districts qualify for different grants because of their population.

### Opportunities for Collaboration that may either Save Money or Improve Programs

State and federal grants typically can be categorized in two ways: entitlement grants and competitive grants. Entitlement grants are often given to districts when a minimal threshold is met; such is the case with Title I funds. The use of entitlement funds is strictly regulated; they can only be utilized for the population that is targeted. Not all of the G4 districts are Title I eligible and the range of needs from the different districts is such that opportunities for sharing amongst G4 districts would be very difficult or even prohibited. Similarly, competitive grants are written to match a district's needs with funds available through a granting agency. Our role-alike group believes there may be opportunities in the future to work collaboratively for competitive grants. Currently none of the G4 districts has a dedicated grant writer.

The G4 grants role-alike group will continue to collaborate on professional development opportunities and possible future competitive grant applications. Professional development that is funded through grants may be offered to other districts either for a small fee to cover incremental costs or free as a joint/collaborative effort. Through the current formal (and other informal) conversations related to the G4 initiative, the districts have shared information related to current structures and practices, areas of expertise, and possible future collaboration opportunities, and we anticipate continuing these efforts. In an effort to structure collaborative efforts, the G4 districts should continue periodic meetings to continue the relationships formed during the project.

## **Business and Financial**

Judy Belliveau - Lincoln-Sudbury Regional High School  
Joy Buhler – Wayland Public Schools  
Buckner Creel – Lincoln Public Schools  
Mary Will – Sudbury Public Schools

### Introduction

The four business administrators of the G4 districts share similar responsibilities, but operate within somewhat different structures. All the administrators are responsible for budget development and management, capital planning, purchasing oversight, oversight of payroll, human resources, facilities and maintenance, food services, transportation, grants management, and financial reporting to the state. The administrators also provide support for, and in some instances directly participate in, contract negotiations.

Lincoln K-8, Sudbury K-8 and Wayland all operate within the structure of the town, and all use the Municipal Information Systems (MUNIS) accounting software platform for finances, while Lincoln-Sudbury, as a regional district, does not use MUNIS and performs and manages all functions independently. The budget process for L-S involves two communities with different approaches to the funding of the high school, and the high school budget is restricted to the lowest amount approved through the communities' town meetings.

### Opportunities for Collaboration that may either Save Money or Improve Program

All the business administrators are members of the professional organization Massachusetts Association of School Business Officials (MASBO) which offers access to professional development, communication with colleagues, and opportunities to get advantageous contracts with vendors. In addition, all take advantage of the Department of Elementary and Secondary Education (DESE) list-serve to garner information from other districts.

Currently, the four administrators save money for their districts by using the above resources to make informed purchasing decisions, and to participate in timely professional development. In addition, all four districts participate in collaboratives for energy purchases, and in The Education Collaborative (TEC) which offers joint purchasing discounts on classroom supplies and food service supplies. Wayland also uses TEC for special education services, while LPS, SPS and L-S are part of the CASE Collaborative. Finally, L-S and SPS currently bid jointly for transportation services, and there has been some discussion around L-S, SPS and LPS joining together to bid on transportation for the METCO program.

There was some discussion as to whether L-S could access the MUNIS system through one of the towns in order for there to be a shared accounting system, but Lincoln and Sudbury currently use different pieces of MUNIS and any significant sharing of resources would require a great deal of research and community outreach to be successful. MUNIS is too costly for L-S to purchase it on its own.

### Post Comment

The G4 business administrators find that both the current formal and informal connections with each other inform their thinking, provide up to date information about efficient operations, and aid in the performance of their responsibilities.

## **Human Resources**

Brad Crozier – Wayland Public Schools  
Kim Goodwin - Lincoln-Sudbury Regional High School  
Ken Storlazzi – Sudbury Public Schools

### Introduction

The Human Resources (HR) function is one of the most important management functions in any organization. The legal, contractual, and operational responsibilities and mandates for school districts are growing; the potential consequences and liability for mishandling these duties is costly. The G4 school districts are the largest employer in each town and the personnel and talent management responsibilities are significant.

The duties associated with the HR function include: recruiting, hiring and inducting staff; administering and interpreting labor contracts; overseeing licensure, Highly Qualified Teacher status, staff educational improvement plans and Professional Teaching Status issues; controlling personnel costs and issuing and tracking staff assignments; supporting negotiations with data and interpretation; serving as a liaison to attorneys for labor and employment issues; communicating with district staff and town staff around payroll and benefit issues; managing staff attendance, personnel files and staff data base; and gathering and analyzing data to complete the growing number of state reporting requirements and to inform staffing and HR decision making.

These duties are currently performed quite disparately across the G4 districts. In SPS, for example, a HR director and an administrative assistant are responsible for the entire HR function in the district. In the other districts, the duties are performed by several staff members who also perform other non-HR related duties as part of their job responsibilities. Wayland is restructuring the payroll and HR operations in their district and will be hiring a HR specialist.

### Opportunities for Collaboration that may either Save Money or Improve Program

Each district operates independently and has negotiated employment contracts with their unions/associations. Each contract is very different and contains language that governs HR decisions and administration. Also, each district utilizes a separate personnel data system. These differences make task-sharing and cost-sharing difficult at best.

The G4 group recommends a continuation and expansion of shared professional development for staff and administrators around legal, operational and labor issues. This could extend to the mandated staff training requirements (e.g. ethics, restraint training, 51A, etc.). Recently Lincoln shared their locally-developed training modules that they use with staff for the 10-11 mandatory annual training content areas.

There may also be opportunities for greater cost sharing for recruitment, job-fairs, and efforts seeking a more diverse work force. There may also be opportunities for sharing costs for such initiatives as programs for tracking staff attendance and substitute teacher management, hiring and deployment.

### Post Comment

Given that HR duties are dispersed across existing positions in the districts (except SPS and soon- Wayland), the ability to collaborate is constrained. Idea generation is restricted by not having a clearly identified job-alike group. Once an idea is generated, the ability to collaborate on development and implementation is constrained by the lack of clear and distinct responsibilities.

SPS, LPS and L-S have initiated a conversation about the possibility of developing a collaborative HR department. One model might have the districts share a highly skilled manager with coordinators existing in each district. This will require more study before its feasibility can be determined.

## **Payroll**

Judy Belliveau - Lincoln-Sudbury Regional High School  
Joy Buhler – Wayland Public Schools  
Buckner Creel – Lincoln Public Schools  
Colleen Wilkins – Town of Lincoln  
Mary Will – Sudbury Public Schools  
Hale Andrews - Consultant  
Bob Springett - Consultant

### Background

At a meeting of the payroll project team on May 10th, members outlined their payroll operating practices and identified four ideas that could lead to operating efficiencies:

- Universal Direct Deposit
- Employee on-line access to payroll information
- Greater collaboration when dealing with MUNIS
- Streamlining and automating the paper based processes.

These ideas were researched further by Bob Springett and Hale Andrews as they followed up with each school district and town representative.

### Research Findings

The payroll processes are reasonably similar across the school districts and towns, although each payroll operation has its own processing methods. Approximately 2500 “checks” are issued bi-weekly or semi-monthly, and a significant number of entries are processed to capture all the information generated by the part time and hourly employees. The processes appear well controlled with multiple checks for accuracy. Payrolls are processed by about 5 staff, see Appendix A.

Processes for salaried, full time employees are the most straightforward, often only requiring an initial set up where their pay is divided across 24 or 26 pay periods. Part time and hourly employees, substitute teachers, coaches, cafeteria employees, custodians, etc, require much more processing. In their case, time sheets must be filled out, gathered by secretaries at each school, authorized by school principals and forwarded to the payroll staff who check the information against contract terms to ensure accuracy. Then the information must be entered into the system and verified before the payroll can be run. The processes for part time and hourly employees are driven by multiple underlying contracts and payment conventions which, while flexible, lead to a cumbersome process. We were not able to gauge the relative productivity of the payroll staff.

The computer systems used by the school districts and towns provide similar functionality. MUNIS, used by Lincoln, Sudbury and Wayland, is an integrated software package targeted to school districts and municipalities. All use the budget/general ledger, payroll and HR modules. However, each town uses MUNIS differently and it is not clear that each is using the same version of MUNIS. There are varying levels of expertise in using MINIS across the school districts and towns and the system’s

capabilities may not be fully utilized. Lincoln-Sudbury is currently looking at several payroll processing vendors including ADP and Harper's to replace its in-house software system.

Payroll processing is mostly paper based and touches many parts of the HR benefits function, which is also paper based. New employee processing affects both the payroll and benefits areas. Initial benefit information as well as ongoing modifications needs to be reflected in the payroll system. We were not able to quantify the amount of time HR staffs spend on payroll linked activity.

The flow of information and the need to capture and retain relevant documents starts with the new employee packet and continues throughout an individual's employment (recording all payroll and benefit changes) and beyond into retirement. In all school districts and towns, this information is maintained in personnel and payroll files. There are thousands of files maintained by the school districts and towns, see Appendix A. These files consume ever increasing amounts of space and often contain duplicate information; in some instances, duplicate sets of files are maintained.

Paper files are a difficult medium to search when asked for information by current and past employees. One district maintains a separate set of payroll cards as a ready reference source to facilitate research and respond more quickly to employees. The more time consuming queries involve a search through old files, e.g. to verify dates and length of service in support of former employees' efforts to buy back service credits. This type of activity can require more than an hour of someone's time. Over the summer, staffs spend considerable time maintaining files.

### Conclusions

Each of the initial ideas discussed by the payroll group and subsequently researched by Bob and Hale offers some opportunity to improve operating efficiency.

Universal Direct Deposit Direct deposit rates now range from a high of 96% to a low of 67% in the four systems. Direct deposit would eliminate lost paychecks which, although infrequent, consume scarce administrative time. Encouraging all employees to move to direct deposit would save this time and offset the one time cost of processing the necessary documents to move employees to direct deposit. Additional efficiencies would result if this were accompanied by electronic rather than physical delivery of pay advices to all employees.

Employee On-Line Access to Payroll Information Each district estimates that it receives a handful of inquiries after each pay period, but inquiries spike when benefits thresholds are reached and deductions therefore change. Responding to these questions consumes some administrative time. On-line access to payroll information would provide employees with the means to access their information directly.

Employee access to information is one of the benefits that Lincoln-Sudbury anticipates if it moves to a payroll service provider. This functionality may be available from MUNIS. Given the small potential savings, we believe this issue should be addressed as part of an overall streamlining and automation program (see below).

Greater Collaboration when Dealing with MUNIS Lincoln, Sudbury and Wayland may realize advantages for the school districts and towns if they collaborate on an ongoing basis in dealing with MUNIS. Subjects for collaboration include vendor management, price negotiation on upgrades/new functions, sharing best practices and training. A MUNIS working group formed by the three school districts and towns would be one way to pursue this idea further.

Streamlining & Automating Payroll Process There may be significant advantages in streamlining and automating the broader payroll process, viewed as an integrated workflow system. The HR process should be included in considering such a step, since the two are intertwined throughout an employee's career. As discussed earlier, payroll information is collected, transmitted, reviewed, checked, and processed almost entirely on paper. Current payroll questions and subsequent requests over time are answered by recourse to paper files kept for each employee. Files are growing, consuming space and requiring increasing amounts of time to maintain. Only by moving away from paper can this process be significantly enhanced (see below).

One other idea was researched by Bob and Hale as they went through their fact finding.

Consolidating Payroll Operations Consolidating payroll operations, in and of itself, would not lead to significant improvements in cost or processing efficiency. Savings would only occur when the processes are streamlined and automated, which can be achieved without consolidating operations. Consolidation would incur the costs and dislocations of change without generating a return sufficient to offset these costs.

### Recommendation

We believe streamlining and automating the payroll and HR processes has the most potential for significant savings. We also believe that there is little left to squeeze from the current operations, further underscoring the need to change. Moving away from paper based processes and more fully utilizing the capabilities of current systems can generate real savings, while better positioning the operations for continued improvement. We see advantages in the following areas:

- Establishing the new employee packet in electronic form
- Capturing employee data electronically, with edit checks built into the data capture process to eliminate errors
- Significant time and cost savings in transferring information in almost all of the many steps in the process
- Employee on-line access to payroll and benefit information
- Faster access to information to respond to employee queries
- Potential to eliminate multiple records and the attendant risk of conflicting/missing data
- Greater security, audit trails and stronger controls on information
- Improved disaster survival/recovery in the event of fire or other casualty
- Greatly reduce the need for file space by using electronic files

These advantages would accrue regardless of the computer system used (MUNIS, outsourced provider) to process payroll.

Without more work we cannot quantify either the range of benefits that would accrue from this kind of change or assess the costs. However, we do know that similar change in other industries have resulted in substantial positive returns.

### Next Steps

To move this initiative forward, we recommend consulting with other organizations of like size (educational and non-educational) that have undertaken similar projects. This research will provide better estimates, based on others' actual experiences, of:

- Costs
- Benefits
- Time frames
- Personnel and computer system demands
- Legal requirements applicable to retention of employment documents, etc.
- Impediments
- Relevant Metrics
- Ways to measure results and ROI

We also recommend that the four districts and (as appropriate) three towns continue to work together on this. They will realize the benefits of one learning curve by conducting one integrated analytical and research process. They will also benefit from greater scale by sharing costs, reducing the costs for each. Finally, a coordinated approach enables an efficient response to new regulatory requirements and other payroll and personnel changes going forward.

Appendix A

| <u>Item</u>                                                       | <u>Lincoln</u>                                     | <u>Lincoln-Sudbury</u> | <u>Sudbury</u> | <u>Wayland</u>      | <u>Total</u>     |
|-------------------------------------------------------------------|----------------------------------------------------|------------------------|----------------|---------------------|------------------|
| Students                                                          | 1100                                               | 1619                   | 3161           | 2721                | 8,601            |
| School Employees                                                  | 398                                                | 225*                   | 400            | 700                 | 1,723            |
| Salaried                                                          | 250                                                | 165                    | 340            | 350                 | 1,105            |
| Hourly                                                            | 148                                                | 61                     | 60             | 350                 | 619              |
| School & Town Employees Working on Payroll (Excl. HR)             | 1.0                                                | 1.0                    | 2.15           | 1.0 (TBH)           | 5.15             |
| Town Employees                                                    | 149                                                | NA                     | 200            | 150                 | 499              |
| Direct Deposit School Employees                                   | 67%                                                | 96%                    | 80+%           | 90+%                | 83+%             |
| Active Paper Files at School                                      | 398                                                | 225                    | 400            | 500; also 500 cards | 1,523            |
| Active Paper Files Town                                           | 538 payroll;<br>538 benefit;<br>149 town personnel | NA                     | 200            | ?                   | Incomplete       |
| Inactive Paper Files School & Town (School Files Kept ~ 30 years) | Thousands                                          | Thousands              | Thousands      | Thousands           | >10,000          |
| Employee Questions Per Normal Pay Period (Excl. Spikes)           | <10 School & Town                                  | Limited                | <10 School     | <10 School          | Est. <40 Schools |

All numbers are approximate.

\*Total school employees does not include substitutes who are paid as needed

## **Food Service**

Robert Harden – Lincoln-Sudbury Regional High School  
Cathleen Higgins – Lincoln Public Schools  
Cheryl Judd – Wayland Public Schools  
Rita Skog – Sudbury Public Schools

### Introduction

Food Services Directors (FSD's) are responsible for the management of the food service operations including the maintenance of cost and quality standards, compliance with district, state and federal policies for school breakfast and lunch programs, oversight of professional and hourly employees, and overall planning, direction, and control of food service units in accordance with operational and financial goals. The G4 FSD's all share the above responsibilities and also provide catering services in house for school functions, town events, and PTA/O's. In addition, the directors in Sudbury and Wayland work with their respective Councils on Aging to provide catering and meals.

Unlike the other three districts, the Lincoln-Sudbury food services program is a contract account managed by Aramark Education K-12. The program is operated as a revenue center for the school and designed to generate a profit while maintaining or exceeding the nutritional value of the meals provided.

Lincoln K-8 is currently limited in its ability to prepare food and use washable trays/plates/cutlery due to the lack of a dedicated cafeteria and dishwashers. Lunches are served in the gym, resulting in scheduling constraints and creating an obstacle to providing a breakfast program. Lincoln is currently working with teachers and groups in town on both gardening and recycling/composting programs that would enhance the food service program and the town's efforts to be more "green."

Sudbury K-8 faces contractual salary issues that contribute to higher costs for its program. The salaries of its cafeteria workers and the holiday benefits provided are higher than in the other G4 districts.

The Wayland Food Service Revolving Account is responsible for the employee health, life and pension benefits costs. There is a conflict between maintaining healthy food and beverage choices for students and selling products that are often more "profitable."

### Opportunities for Collaboration that may either Save Money or Improve Program

The districts, with the exception of L-S, are part of The Educational Collaborative (TEC) that allows for joint purchasing from vendors at discounted rates. In addition to these current savings, the G4 team determined that they could explore cost savings through collaborative purchasing of uniforms, through shared training in the NutriKids system, by working together on grant opportunities, and by sharing information on financial transactions and practices that support efficient operations.

Other suggestions for saving money include the consolidation of labor advertising and the development of a "floating" labor pool of substitutes, the possibility of a joint equipment maintenance plan, joint purchasing of equipment, and the establishment and

maintenance of a proactive human resource function to ensure employee motivation, training, wage/benefit administration and compliance with labor regulations.

Suggested initiatives to improve program include joint training and professional development, joint menu development to create a series of “ideal” cycle menus with recipe database access, periodic visits to other districts to see how they are operated, and the development of on-line technology to market the school lunch program to students, parents, and staff.

#### Post Comment

The G4 Food Service Directors found this forum for communication very helpful, and have continued to have conversations with each other about ways to improve program and save money. They plan to continue the dialog moving forward.

## **Facilities and Maintenance**

Michael Haines – Lincoln Public Schools  
Joe Kupczewski – Sudbury Public Schools  
Patrick Morris – Wayland Public Schools  
Kevin Rossley – Lincoln-Sudbury Regional High School

### Introduction

The Facilities and Maintenance Task Team was comprised of the facilities managers for Lincoln-Sudbury Regional High School, Sudbury Public Schools, Wayland Public Schools, and Lincoln Public Schools. The group met twice during the winter of 2010 (on January 20 and February 23).

### Functions

Facilities maintenance involves three core components: custodial, maintenance, and grounds operations. Buildings and grounds staff working in these three core areas are responsible for maintaining the buildings and the adjacent grounds. Maintenance of these facilities includes (but is not limited to) general repair to structures and operational systems, winter and summer site maintenance, athletic fields, recycling, material handling and transport, custodial support, grounds support, safety oversight, etc. Ultimately, facilities managers are responsible for oversight of these core areas, as well as many other requisite functions of facilities management.

### *Custodial*

Each building must be cleaned and made ready for student learning each day. The vast majority of this custodial work happens outside of the school day. Custodians are responsible for housekeeping of the entire building, which includes cleaning of classrooms, science labs, faculty and staff offices, restrooms, corridors, lounges, gyms and general use areas. Of the four G4 districts, Lincoln-Sudbury is the only district that outsources custodial services. A cleaning crew comes in each evening to prepare the facility for the next school day. In the other districts, custodians employed by the school perform all custodial services.

### *Maintenance*

Physical facilities are the taxpayer's investment, and must be kept in good shape to ensure that the building spaces are preserved as safe and conducive learning environments throughout the life span of the structures. The ability of the district to perform in-house maintenance depends on the specializations of the maintenance staff (electrician, HVAC technicians, waste water treatment plant operators, plumbers, etc.). Major maintenance projects are often deferred or performed by contracted laborers. Wastewater treatment operation is an integral part of facilities maintenance, as our communities do not have central sewer service.

While there is the potential for overlap of town and school maintenance professionals, with town maintenance employees filling work-orders in the schools and visa versa, this generally doesn't happen.

## *Grounds*

The landscaping outside of the physical plant and all spaces that are used by the school's educational program (including athletic fields and school playgrounds and extracurricular) must be maintained to provide for a safe and conducive learning environment. Grounds operations include, but are not limited to:

- landscape design and installation
- tree, shrub, and flower bed maintenance
- turf maintenance
- athletic field maintenance
- snow and ice removal
- sidewalk and roadway maintenance
- storm water maintenance, and
- material hauling and debris collection.

The Department of Public Works does maintain grounds, school playing fields, and snow plowing of school lots for Sudbury, Wayland, and Lincoln. Lincoln-Sudbury grounds professionals maintain the school's fields, grounds, and parking lots.

## *Overall Facilities Management*

While custodial, maintenance, and grounds comprises the focal areas of facilities management, there are many "office" related tasks that must be completed. Facilities managers work with finance directors with regard to vendors and service contractors, and to develop budgets to support facilities-related functions. They frequently coordinate with town departments (including Department of Public Works, police, and fire) and respond to facilities and public safety emergencies in their buildings. Facilities managers develop, prioritize, and issue maintenance work orders. They develop training programs for custodial, maintenance, and grounds staff. They evaluate and supervise custodial, maintenance, and grounds staff. Facilities managers research and conduct purchasing for custodial, maintenance, and grounds needs. They monitor facilities expenditures, with a keen eye towards monitoring utility consumption. They also implement integrated Pest Management Plans and any needed Asbestos Abatement Plans.

## Technical Skills and Licensing

To run school facilities, three areas of licensure, certification, and or training, are generally required:

- Electrical – needed for both power, communication, and data lines
- HVAC – for upkeep of building heating, air conditioning (where available), and ventilation systems
- Wastewater Treatment Plan Operator License

A buildings and grounds staff possessing additional licenses, certifications, or training can help reduce the need to outsource different tasks. Examples of expertise that would be beneficial:

- Licensed Applicator – to apply regulated pesticides and/or fertilizers to grounds and athletic fields.
- Facilities Management Certification
- Construction Supervisor
- Certified Building Operator – a certification denoting additional training on monitoring utility consumption in order to maximize conservation
- Integrated Pest Management – for pest management, both indoor and outdoor (field)
- Chainsaw safety
- Massachusetts Certified Public Purchasing Official Program – an additional training on the regulations for procurement, generally needed for facilities managers given the volume of procurement required for the position
- Turfgrass – training for maintenance of artificial turf fields
- Plumbing – a specialty required less frequently than an electrician, but when the need arises, having a plumber available is helpful

### Town-Level Issues

Lincoln Public Schools has no maintenance shop in either of its two campuses. There is also no stock/storage area (for filters, cleaning supplies, etc.), which becomes an issue when staff are required to travel offsite for needed parts and supplies. The schools try to have items delivered, when possible, to keep labor on site. Occasionally, there is “down time” when maintenance staff have to travel offsite for parts, but this only happens when there is an immediate need. There are plans for a shop area and stock area; however, implementation of these plans has yet to take place.

Sudbury and Lincoln-Sudbury are doing more with fewer fiscal resources each year. Costs for energy, materials, and services increase every year, while budgets for staffing and maintenance projects decline. Budget cuts during the past two years have made it difficult to maintain the level of service many had become accustomed to in the past, but expectations have not adjusted downwards as fiscal resources have dwindled. Dwindling maintenance budgets only postpone maintenance repairs.

### What’s Currently Being Done To Save Money

Sudbury schools are replacing existing classroom wall switches with new wireless motion activated radio frequency ceiling mounted occupancy sensors – this saves on utility expenses and increases the longevity of the lighting fixture. They are also installing more modulating electronic valves in the existing heating system roof top units. These valves are controlled by the existing Direct Digital Controls and will improve interior climate comfort, while also providing energy savings. They are also expanding the number of Direct Digital Controls to the existing HVAC equipment throughout the schools, which should result in better efficiency and energy savings.

Lincoln-Sudbury has been working on many ways to save money and be more energy efficient. The high school is in the process of isolating zones on both the lighting and HVAC automated systems, so that at night and unoccupied hours only specific areas and levels of the building are lit and temperatures are lowered. Lighting and HVAC can now be controlled remotely, via the Internet, thereby reducing the overtime cost of having a technician come to the school to make an off-hour adjustment. The high school

participates in EnerNOC's demand response program, which rewards the school district with periodic payments in exchange for reducing electricity consumption during times of peak demand. Lincoln-Sudbury has also been cutting cost in a number of other ways, including:

- having buildings and grounds staff adjust work schedules to reduce overtime costs,
- snow removal is done by staff (and not outsourced),
- refinishing the gym's wood flooring was done by staff (and not outsourced),
- most electrical/mechanical/HVAC repairs are completed by staff (rather than contractors), and
- the school's comprehensive recycling program helps eliminate waste disposal costs.

### Collaboration That Could Save Money

Knowing how other districts operate is a positive move. Having facilities managers meet as part of this G4 process has allowed them to begin exchanging ideas and to begin routinely sharing information, such as bid specs, requests for proposals, and utility service information.

These initial meetings have also put managers in each district on the radar screens of one another, and when unexpected events occur, there is "mutual aid" available. For example, during the spring flooding in early 2010, Lincoln Public Schools found their boiler room under about 8 feet of water. Throughout Massachusetts, pumps were in short supply as households and businesses were struggling to keep their basements from flooding. Lincoln Public Schools placed a call to Lincoln-Sudbury, and Lincoln-Sudbury maintenance staff were able to deliver equipment from their district to support another. This allowed the boiler room to be pumped out sooner, thereby minimizing the impact of this event on teaching and learning.

Consolidated training and procurement amongst the G4 districts may provide small cost savings and improved levels of service. For example, each district pays for various safety trainings, and the four school systems could schedule trainings together. The districts all purchase large quantities of supplies to maintain the schools (like wax, light bulbs, and trash liners) and a consolidated procurement may allow for these items to be purchased "in bulk", which could decrease the cost of the supplies to any given district.

Lincoln-Sudbury maintains its own wastewater treatment plant. The new Wayland High School will also be required to maintain its own wastewater treatment plant. It may be possible for Wayland High School and Lincoln-Sudbury Regional High School to share/split staff to maintain the wastewater treatment facilities of each.

## **Transportation**

Judy Belliveau – Lincoln-Sudbury Public Schools  
Joy Buhler – Wayland Public Schools  
Buckner Creel – Lincoln Public Schools  
Mary Will – Sudbury Public Schools

The Transportation Task Team was comprised of the business directors from each district. They reviewed common practices for regular, special education, and METCO transportation, the respective bus contracts, and opportunities for sharing services or jointly bidding contracts.

### Function

All municipal (non-regional) school districts are legally required to transport students in grades K-6 who live more than 2 miles from school without charging a fee. All three non-regional districts also provide a fee-based transportation option for students who live within the 2-mile radius. The state no longer provides the reimbursement for municipal district transportation that existed when these requirements were adopted. Regional districts, including L-S, must transport all students without any fee; they receive partial reimbursement from the state (which varies year to year). School transportation is subject to other regulatory requirements, including bid processing rules and a required rate of labor costs for towns of a certain size.

All four districts use bus company vendors to provide regular in-district transportation. The districts also use vendors to provide out-of-district special education transportation and, in some cases, in-district special education transportation that is separate from the regular bus routes. SPS and L-S have jointly bid in-town transportation for many years; this allows multi-tier bus routes (with buses making multiple runs per day serving more than one school). SPS and L-S also jointly hire a transportation coordinator.

The primary costs for regular school transportation depend on the number of buses -- each bus has given costs which include the driver's salary and benefits, the fuel for the routes, periodic maintenance, insurance, and storage of the bus when not in use. There generally are not large economies of scale in the operation of a larger number of buses that run similar routes. The primary costs-saving opportunities involve coordination of multiple daily runs or routes per bus. With the use of special routing software, the districts have fine-tuned the number and timing of the bus routes over the last several years in an effort to save money by cutting the number of required buses. SPS has saved the cost of one bus for the 2010-2011 school year, resulting from its recent redistricting of the elementary schools. These ongoing efforts to save costs also must balance other factors such as safety for all students and the length of time students spend on the bus each day. Further, the multi-tiered bus routes dictate certain start and end times for the schools.

### Recommendations/Next Steps

In previous years, the four districts have modified their METCO bus contracts in an effort to align the end dates, allowing the districts to seek a joint METCO bus contract, possibly starting in FY2012.

The districts also will consider the possibility of joint bidding for regular in-district transportation contracts. This consideration will include efforts that would be needed to align the contracts as well as school calendars. Increased coordination of buses might also require adjustment to school start and end times. Further exploration of routing options is required; for instance, the Wayland location and traffic patterns may be more closely aligned with those in Weston than with the other G4 districts, especially concerning METCO transportation. Another factor that must be weighed is the possibility that SPS and L-S could extend the current bus contract at a favorable rate, which may produce greater savings than potential expansion of the current joint bid.

Finally, the districts will continue to collaborate and share information concerning the various vendors and options for special education transportation.