



# Why Not Use the TASBO Performance Excellence Program to PEP Up Your Organization?

By Frankie Jackson, TASBO President

If you attended the 65<sup>th</sup> Annual Conference in Austin this year, you know that TASBO awarded the first Performance Excellence Program (PEP) awards, modeled after the Baldrige National Quality Program Education Criteria. I am proud to say that mine is one of those Districts! If you haven't already, you need to consider using the TASBO PEP as your framework for increasing efficiencies and improving your organization's performance. Think about it, the word PEP means *to have energy and enthusiasm*. With today's economic situation and the need to increase efficiencies more than ever before, why not PEP up your organization? It offers two major benefits:

- An integrated, systematic course of action based upon the principles of accountability and data-driven decision making; and
- An information-based model that focuses on educational processes and efficiencies, with the intent to evaluate everything you do *that adds cost without adding value*.

The PEP hones in on areas that may be overlooked such as leadership, systems thinking, changes in culture, and data-driven decision-making. The most constant core elements of the PEP include:

- A focus on continuous process improvement through data collection and analysis;
- A long-term perspective;
- Benchmark comparisons and improvement trends;
- Conceptualizing the entire organization as a system; and
- Emphasizing overall improvement of core processes rather than individual improvement.

During our budget preparations this year, we are all taking out a sharp knife and cutting large portions of our budgets. These reductions could be in travel, memberships, professional development, benefits, salaries, and/or staff. What if we are cutting into the core of our business and operations processes, which in turn affects student learning? We may be reducing costs but are we improving efficiencies? What about longer-term repercussions?

Texas Association of School Business Officials  
Performance Excellence Program

### The Framework

- **Leadership** - How do you set values, directions, and performance goals? What is your role as a leader?
- **Strategic Planning** - How are strategic objectives and action plans developed and how is progress measured?
- **Customer Focus** - How are your customer expectations, preferences, and requirements determined?
- **Information and Analysis** - What are your key performance indicators and measurement systems?
- **Human Resource Focus** - How do you motivate, train, compensate employees and develop employee potential?
- **Process Management** - What are your core processes and how are they analyzed, measured, and improved?
- **Results** - What are your results? Who do you compare yourself to? What is your performance level in all areas?

### The Values

Agility – Being flexible and getting things done faster  
 Focus on the Future - Understanding of the longer-term view  
 Systems Perspective - Managing the whole organization  
 Visionary Leadership – Setting directions with high expectations  
 Management by Fact – Using measures to drive decision making  
 Managing for Innovation – Making major improvement/change  
 Learning-Centered – Using high developmental standards  
 Valuing Staff and Partners – Showing commitment to well-being  
 Public Responsibility - Practicing good citizenship  
 Organizational/Personal Learning - Solving problems at their source, and effecting change and sharing knowledge  
 Focus on Results and Creating Value – Achieving the highest levels of performance and increasing efficiencies

### Who Can Benefit?

TASBO

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Distribution and Inventory

PEIMS

Safe Schools

Personnel

Accounting and Finance

Maintenance and Operations

Payroll

Transportation

Risk Management

Purchasing and Supply Management

Information Technology

Internal Audit

School Nutrition

You may not know unless you evaluate everything you do systematically, using a system-wide, cross-functional approach. That is where the PEP can help—implementation strategies targeting improvement of core processes with a longer-term outlook. Outcomes are difficult to measure. When you focus on core process change and improvement, and link processes to outcomes, you can manage your job more effectively. This provides a roadmap for organizational improvement and performance excellence.

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Another reason to consider the PEP is the emphasis on alignment. The work in our organizational units, such as Information Technology and Maintenance and Operations, supports organizational, district-wide goals. There is overlap in all of our processes. It is important to have consistency of plans, processes, and a common understanding of purposes and goals. The PEP supports complementary measures and information for planning, tracking, analysis, and improvement at three levels: the district/senior level, the key process level, and the work unit, program, school, class, or individual level.

Now more than ever, with the complexities of our jobs, we need each other to share processes that represent best practices and performance for similar activities. We should never *reinvent the wheel*. We need to benchmark with each other to understand the dimensions of best-in-class performance.

Think of the PEP not as an award but as a process of *voluntary* accountability that can be used in any TASBO area, at any level. As shown in TASBO PEP

Framework, the PEP does not prescribe a method for addressing the criteria. The seven categories and 11 core values offer a realistic paradigm to analyze, evaluate, and consider for performance excellence. It is up to you to decide how to use PEP that best fits your organization.

Another perk about the TASBO PEP is that it's aligned with the National Baldrige program, managed by the National Institute for Standards and Technology ([www.nist.gov](http://www.nist.gov)). This means there are opportunities to form partnerships with businesses and healthcare institutions, as well as access to free resources. If you don't do anything else, consider the PEP self-assessment to set forth a plan of action for improvement. More information can be found on the TASBO website at [www.tasbo.org/resources/awards/tasbo-pep](http://www.tasbo.org/resources/awards/tasbo-pep).

As I write this, my mind is inundated with the magnitude of our responsibilities—to our Texas students, our communities and

taxpayers, and the staff in our districts. We must be accountable for doing things right, reducing inefficiencies, and finding ways to accomplish our work with a minimum amount of time and effort, at the lowest possible cost. That is why we should consider using a standard framework like the PEP—one that has been proven in business and industry, one that is sponsored by the government, and one that is available through TASBO. Consider infusing energy and enthusiasm into your organization by using the TASBO PEP!

Our jobs provide services to one of the most important resources in the State of Texas, our students! I can't think of a more admirable profession. I am grateful for your service to Texas school districts. Thank you for devoting your time and energy to the TASBO community. I appreciate your willingness to improve and share. Thank you for an opportunity to serve you this year as your TASBO President.



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# Management Reviews of Maintenance and Operations in School Districts

By Tom Canby, Director of Research and Technology

One aspect of living in the electronic age is the ever-increasing array of high-tech features in everyday gadgets. Another aspect of the high-tech age is that gadgets cease to start-up or function very poorly when one minuscule part breaks or is out-of-adjustment. Depending upon the malfunction, we may attempt to use the device anyway and hope for the best. Then there are times that a malfunction in a relatively new device may have been avoidable with a small investment of time in reading or viewing the how-to-operate instructions.

The service portfolios for instructional support areas benefit all of the teachers and students on individual campuses and across the district during the instructional day. A decline in performance involving what may appear to be a relatively small component of a service portfolio may affect many instructional and operational areas in the school district. If the effect is not immediate it will probably be noticeable over time as the performance issues slowly pervade the school system. Being comprised of highly resourceful and creative individuals, the school system may be lucky if affected staff implement Plan B or C. As much as we may admire our staff for their resourcefulness, the work-around will cause increases in cost due to redundant efforts and divert staff resources to some degree from the primary roles and responsibilities in their job description(s).

Many times we hear from school administrators that “everything is going well” when the school district has a balanced budget. Misperceptions that there are no

significant opportunities for improvement may be based upon having a balanced budget, combined with anecdotal stories and informal observations about staff and costs. All things being almost equal, the informal assessments are not effective for performance management purposes. This observation is supported by many Texas School Performance Reviews by the Legislative Budget Board (the current office of responsibility), the Comptroller of Public Accounts, and various consulting firms. The need for greater efficiencies in maintenance and operations is understandable considering expenditures in this area are nearly 12 percent of total operating expenditures in the General Fund.

A management review is a professional assessment of operating efficiencies and other improvement opportunities. Outside consultants often hear two primary questions from school officials who are interested in a management review: How do staffing levels and costs in business services and/or operations in our school system look in reference to comparable school districts? and How well are the staff members in business services or operations performing their assigned duties and responsibilities?



These two questions asked by school officials are the springboard for the consultant’s evaluation of processes and more granular details about staff, costs, resources, quantity of outputs, quality and impact, in addition to the status of results-based management. A healthy attitude about opportunities for improvement is the best motivator for seeking an outside evaluation. The outside evaluation is customized to fit the needs of the organization and delivers recommendations that are specific to the consultants’ observations of various opportunities for improvement. We may agree on the body of knowledge representing best practices; however, the management review report delivers recommendations that are actionable. An

additional motivation is that the recommendations from an average management review identify substantial cost savings that generally exceed the fee charged for the review by a substantial amount.

A recent management review in maintenance and operations resulted in many recommendations for improvements and costs savings, including the few examples listed below:

- It is efficient to have the largest amount of the custodial crew cleaning during the unoccupied times of the evenings. Most of the school campuses can effectively open each day with one highly qualified custodial staff member and having a second custodial staff member arriving close to the lunch hour.
- The district should restructure current staffing from 18,000 square feet per custodian full-time equivalents (FTE) to 20,000-22,000 square feet per

custodial FTE, which will support the planned expansion of square feet next year without adding staff.

- Standard cleaning procedures should be put in place to ensure all custodians follow the same procedures for like types of tasks.

**Most of the management reviews provided by TASBO in the area of maintenance and custodial services are only one week in duration.**

- Cost savings and product efficiencies come from proper chemical mixing. It is recommended that the district look at cleaning chemical providers that offer proportional mixing systems.
- Implement frequent customer service surveys. Customer service surveys should be electronic, and kept short and consistent district wide.
- Expand the use of key performance indicators and incorporate certain KPI's in annual performance evaluations.

- All new work and/or rehabilitation work must have sign-offs by the Director of Maintenance so that sustainable materials and wall surfaces that are less difficult to maintain will be used as part of the design and construction. The results will be a reduction in long-term maintenance costs and save the district money over the life of the facility.
- M & O should develop a compliance/inspection section that goes behind all work whether performed by Contractors or in-house staff. This will reduce the need for re-work and change orders that result in shoddy practices and unfinished business.
- The district has invested in a new/modern technologically sound work order tracking system that includes various modules with capabilities to quantify and categorize work orders and historical data for the purposes of determining capital outlays and conduct cost/benefit analysis on any project. The system should be installed as soon as possible to improve the management of resources and costs dedicated to maintenance activities and work orders.

*continued on page 10*

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Management Review, continued from page 9

- The M & O Department should work a hybrid of staggered shifts so that a small number and yet a variety of technicians are reporting to work by 6:30 a.m. That would give the district coverage by perhaps two cooling/heating specialists, a roofer in case it rains heavily before school starts or the night before, an electrician and perhaps a locksmith to address broken keys and random vandalism, as well as either a carpenter or glassman to seal, secure and restore broken windows.
- The district should relocate the Energy Manager and all staff associated with Energy Management into the Maintenance Department. This move will give the district a single point of contact for energy usage and bills and repairs and establish a more accountable relationship between the end users and the provider.
- The Energy Manager should consider re-implementing the evening and early morning energy walk-through. The walk-through should be done inside and outside the building.
- Energy reduction strategies need to be implemented to lower energy costs per square foot, which could result in a potential cost savings up to \$600,000 per year, based upon benchmarking data.

## TASBO Management Reviews

TASBO can perform management reviews in areas such as technology, risk management, human resources, child nutrition, PEIMS, organization structure, staffing, payroll, accounting, transportation, federal grant compliance, and many other areas.

TASBO also performs staffing reviews. After collecting data from the Superintendent, Human Resources, Finance, Curriculum, Operations, Technology Departments, and all campuses, the following tasks are performed by the team members in order to achieve the objectives of the evaluation.

- Reviewed historical and current financial, operational, student, and staff data;
- Studied relevant written material pertaining to the district, such as policies, procedures, forms, organizational structure, and staffing rosters, including campus master schedules;
- Reviewed staffing levels as identified by campus master schedules and/or staff rosters;
- Studied the economy and efficiency of the organizational structure;
- Interviewed selected personnel in the school district;
- Reviewed the roles and responsibilities of selected personnel in the school district;
- Reviewed automation and operational procedures;
- Reviewed job descriptions;
- Reviewed student enrollment historical data and projections;
- Reviewed budget/financial data as it relates to staffing expenditures and availability of resources;
- Reviewed current staffing and hiring practices;
- Reviewed and compared El Campo ISD staffing levels to peer districts, statewide averages, and/or to industry standards; and
- Reviewed other related information obtained as part of the review process.

TASBO's staffing reports have identified millions of dollars of potential savings for districts. The reviews are done by TASBO team members who are knowledgeable in all areas of schools. The reviews can include a specific department or the entire district, which includes a detailed review of the master schedules.

More information on TASBO Management Reviews can be found at [www.tasbo.org/resources/management-reviews](http://www.tasbo.org/resources/management-reviews) or by contacting Becky Bunte, Director of Professional Development, at [bbunte@tasbo.org](mailto:bbunte@tasbo.org).

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Most of the management reviews provided by TASBO in the area of maintenance and custodial services are only one week in duration. The one-week review includes: an initial planning phase for offsite information gathering and analysis; an onsite visit for two to three days; and delivery of a verbal report to management and central administration before the consultant(s) returns home. It is not unusual to hear from management that they were very surprised with how much the consultants discovered after brief visits on campuses and the maintenance and operations headquarters offices. Consultants assigned to a management review project have many years of experience and are able to make extensive observations during their brief onsite visit. A management review may be longer in duration depending upon the school district's needs, which may include providing assistance with ongoing

A management review may be longer in duration depending upon the school district's needs, which may include providing assistance with ongoing oversight over one or more operational areas (more time may be needed in larger-enrollment school districts).

oversight over one or more operational areas (more time may be needed in larger-enrollment school districts). It is highly recommended that school districts request a follow-up review within six months to one year to obtain a status report on the implementation of recommendations.

In real life, informal assessments that operations are running fairly smoothly may not be entirely accurate for reasons that are not readily observable. As we go about our daily routines, all cars are moving down the interstate at relatively the same speed, including ones that are maintained at all service intervals and those that are not. As little kids sitting in the back seat of our parent's sedan in the fifties and sixties, we learned through observation about checking the oil level every other week at the full-service gas station (for readers born after the Baby Boomer generation see <http://bit.ly/fuzzWv>). We strive to avoid surprises in our management and oversight of instructional campuses that can happen when we do not invite someone from outside to look under the hood and kick the tires.

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