

Common Council Actions

CITY OF NORWALK
NORWALK PUBLIC SCHOOLS
PRICEWATERHOUSECOOPERS'
COMPREHENSIVE MANAGEMENT & OPERATIONAL ANALYSIS
A JOINT MEETING OF THE COMMON COUNCIL
BOARD OF EDUCATION AND
BOARD OF ESTIMATE AND TAXATION

FEBRUARY 6, 2002

ATTENDANCE:

Mayor Alex Knopp; Pam Stark, City Clerk; Jack Miller, Finance Director; Rick Darling, Finance Department; Dr. Salvatore Corda, Superintendent of Schools

Members of the Common Council:

Joseph Mann; Bruce Kimmel; Kenneth Baker; Douglas Sutton; William Wrenn; Matthew Miklave; Judith Rivas; Fred Bondi; Kevin Poruban; Christopher Perrone; Betsy Bain; William Krummel; Jeanette Olmstead-Sawyer (7:45 p.m.); Barbara Hudgins (7:45 p.m.)

Members of the Board of Education:

Thomas Vetter; Roz McCarthy; Rosa Murray; Jodi Bishop-Pullan; David Cole; Marina Rivera; Thomas Cullen (7:45 p.m.)

Members of the Board of Estimate and Taxation:

David Davidson; Randall Avery; Tulio Lopez; Tami Napoletano

**PRESENTERS FROM
PRICEWATERHOUSECOOPERS:**

Henry Jones, Robert Sampieri, Martha Kincheloe, Annette LaPrade, Don Wilks, James Keeley

CALL TO ORDER

Mayor Alex Knopp called the meeting to order at 7:35 p.m. He announced to the assembly that the purpose for tonight's meeting was to receive the audit report and allow those Boards that deal with the City budget to have the opportunity to be briefed on the report and ask questions.

Mayor Knopp advised the assembly that each Member should be in receipt of a complete set of 3 bound volumes and in addition a handout that would follow the presentation. He also advised that the entire report could be extracted from the Internet via www.norwalkct.org.

Mayor Knopp informed the assembly that the report would be presented in the form of overheads. He explained that there were a large number of recommendations in the report and tonight the presentation would focus on approximately 44 of them. Mayor Knopp advised that Mr. Jones would begin the presentation by discussing some of the recommendations and then different members of his team would discuss others. He stated that after each recommendation was made a brief discussion would be entertained.

**MR. HENRY JONES: OPENING REMARKS AND INTRODUCTION
OF TEAM MEMBERS**

Mr. Jones gave the opening welcome and introduction of the team. He announced the agenda to the assembly. He explained that the purpose of the study was to deal with business efficiency and improve the operational practices of the school management organization. He remarked that initially to a degree the study was undertaken for cost saving and to identify the areas that could make a difference if the recommendations were implemented. Mr. Jones stated that the second part of the study dealt with the school infrastructure.

Mr. Jones explained that there were 3 volumes to the report. He said that Volume I was an executive summary of the operational management component of the study. He informed the Members that they would not be talking specifically this evening about individual cost savings or increases. He advised the assembly to refer to Page 30 of Volume I as it enumerated the various recommendations item by item with the corresponding estimated savings.

Mr. Jones stated that Volume II was the detailed report. He added that Volume II included the executive summary as well as the detailed analysis dealing only with the operational component of the study. He went on to state that Volume III was the executive summary and the detailed report of each of the recommendations in terms of the operational analysis. He noted that almost 300 recommendations had been included in the documents. He added that this evening the team would present an overview of the major recommendations.

Mr. Jones advised the assembly that it was important to note that some of the recommendations might require union negotiations, i.e. contracts with teachers. He also advised that another aspect of the recommendations might require negotiations with the State Fund of Education and one or two might require looking at the law. He remarked that a whole host of recommendations could be implemented with the concurrence of the Board of Education. He commented that a suggested implementation strategy had been provided denoting which fiscal year the recommendation could be implemented.

Mr. Jones stated that the projected fiscal impact was a straight line estimated savings and it could vary depending upon which recommendations were implemented.

SCOPE OF THE OPERATIONAL ANALYSIS

Mr. Jones stated that a number of recommendations would fall in this category and he outlined the 12 targeted areas. He stated that they had received a functional organizational chart when they met with the Board of Education. He informed the assembly that the first of the recommendations involved 2 very large items. The first he said dealt with health and medical benefits for employees. He advised that cost sharing of this item would realize significant savings. The second he said was the recommendation to outsource custodial services.

FINDINGS AND RECOMMENDATIONS

Mr. Sampieri stated that when findings were reached they usually generated commendations or recommendations. He went on to state that the team was limited on commendations and big on recommendations. He advised that as they conducted their interviews and reviewed documents they discovered that the interviewees were very experienced, well educated people who were extremely dedicated. He added that they were solid citizens who knew their professions.

Mr. Sampieri then reviewed the findings and recommendations for 5 of the listed organization and management practices. He stated that they had found that performance management was limited to personnel evaluations and performance against the budget. He noted that there were no performance standards. He pointed out that a well-run operation must know the standards and at what level success or nonsuccess was defined.

He stated that the current organizational chart lacked a well-defined organizational unit. He noted that the chart they had been given by the Board of Education was in its embryonic stage. He advised that his team had developed one that added some structure and personnel resources to the chart. He then reviewed the chart with the assembly.

Mr. Sampieri remarked that the District offices and schools were generally unaware of the Administration's vision, strategies and accomplishments. He recommended that a communication plan be implemented. He then remarked that few formal policies and procedures existed and recommended that a portal be developed to district information that served as a repository. He stressed that there were many duplicated efforts being made in collecting the same data to prepare records for State reports. He noted that it was costing a lot by not having a user management friendly system.

Next, Mr. Sampieri advised that teacher staffing might exceed the collective bargaining teacher ratios. He remarked that they found there were 29 more teachers than required and he recommended that this be reviewed with more data. He pointed out that 85% of the District's cost was for salaries and benefits and if they were going to realize any savings they had to target where the money was. He reiterated that this was an area to examine and a review process should be created.

Mayor Knopp asked Mr. Sampieri to explain more about the methodology used to determine that there were an excess number of teachers. He also asked him how the ratio was identified. Mr. Sampieri replied that the Collective Bargaining Agreement stated a 22-1 ratio and they reviewed the actual

enrollment by grade groupings. He explained that when it was aggregated in that manner there was an excess of 29. He commented that based on the data they reviewed they could not determine if the assignments were due to special purposes. He noted that there were many variables and since they did not have the information yet it was only a placeholder at this time.

Mayor Knopp elaborated on the process that was used to make this determination and stated that the only way this methodology produced surplus teachers would be if the City changed its assignment methods and combined grades. He noted that only then could this way show a savings.

Mr. Jones interjected that the contract showed that students grades K-3 were grouped and the ratio was 22-1. He stated that he realized students did not come in that type of package and some classes would have more, some less. He explained that when the aggregate base was reviewed their suggestion was to implement a review process. He stated that in managing a school it was the organization of the school that generated these extra teaching positions. He noted that organizing the classes in a different way could combine the grades. Mr. Jones remarked that the team felt obligated to look at that because one school had 3 positions in excess of the ratio. He added that it was difficult to understand how the organization of that school would generate the 3 teachers. He advised that if upon review of those positions in that school it was determined that the positions were allocated for basic instruction or bilingual and the definitions were not correct they had to be changed.

Mayor Knopp reiterated that the statement might hold true only if the classes were aggregated and the team had no information to present on a grade-by-grade basis.

Mr. Sampieri said that the word "extra" was used but the team's explanation did not infer that the teachers were extra but that they exceeded the ratio. He added that their recommendation was that a review process should be established to clarify that information.

Mr. Sampieri addressed the finding of duplication of functions between the Board of Education and the City. He stated that it was difficult to make a determination if the purchasing, accounts payable and payroll functions should be consolidated. However, he did note that due to the complexity of handling a school payroll it would be best not to consider consolidating this function.

He then discussed community involvement practices. He remarked that the team determined that the mission was not being fulfilled. He read the existing

mission statement and made recommendations to change the statement from "managing public perception" to providing public information about the Norwalk Public Schools.

Mr. Sampieri moved on to Finding #9 which addressed professional development. He stated that in-service training was an important ingredient in any organization. He went on to state that their review showed there was no central coordination or determination of those needs. He recommended that this be consolidated into a formal unit.

Mr. Miklave asked if in the course of the team's analysis have had the opportunity to review the result of the Schools for the New Millennium Project. He remarked that 600 parents had developed ideas and spent much time on the project. He advised that he served on the Committee and knew this had been one of their recommendations. Mr. Sampieri replied that the Millennium Report was very comprehensive and a great example of a public information exchange. He noted that there was a discussion of that issue in the large report. Mr. Miklave asked if those findings were taken into consideration when the team did their analysis. Mr. Sampieri replied that they were not and that this was an analysis that related to the interviews and documentation of that office.

Next, Mr. Sampieri discussed Special Education. He stated that it was a sensitive issue on which additional information was being prepared. He advised that the Superintendent was preparing the information and the team would be receiving a copy. He noted that it dealt with the idea that statistically some students were being trained outside of the District. He explained that there were many factors involved in that and many played an important role. He elaborated on the costs to the District and stated that the recommendation was to identify the rationale used by the physician or parents in making their decision that the student needed to be placed out-of-District. He added that it was important to enlist the information in generic terms to ascertain if there was some type of perception.

Mr. Sampieri addressed the next finding and stated that Board policies and administrative guidelines with respect to Special Education needed to be reviewed and updated to be in-line with all revised and added Federal and State statutes. He then advised that there was a substantial lack of management information available in Special Education. He noted that the staff had a terrible time assembling data that needed to be sent to the State. He pointed out that a lot of good work had occurred in the District already but the District was substantially behind to initiate any revisions of curriculum. He stated that the team had devised a schedule that would enable these things to be done over a

seven-year period in a systematic way. He stated that the revisions should be made in Language Arts, Mathematics, Art and Business. He noted that it would require hundreds of manpower hours but these were the guidelines that teachers used.

Mr. Sampieri stated that at the time of the analysis the current staffing resources were inadequate. He recommended that at least 3 additional instructional specialists be assigned for the remainder of the school year. Dr. Corda interjected that 2 positions if not 3 had been funded and approved. Mr. Sampieri remarked that was a commendation.

Mr. Sampieri stated that a curriculum advisory committee should be established immediately. He went on to state that there was no real strategic management plan in place regarding the overall structure and it needed to be developed in a very sophisticated way.

Mr. Sampieri remarked that there was no system in place that provided all the schools with information regarding curriculum standards and guides, sample units, assessment tools, test items, teacher lesson plans, curriculum integration resources and successful practices. He advised that there were software programs that existed and were being utilized by school systems to supply information to teachers. He suggested that the electronic information system that already existed be utilized and with a small investment teachers could see samples of good lessons.

Moving on to Finding #18 Mr. Sampieri advised that a Board policy to provide a pre-K program for four-year-old pupils throughout the District be considered. Also he asked that consideration be given to developing a comprehensive plan and schedule to install a pre-K program at each of the 12 elementary schools – two classrooms per year. He discussed the benefits to the students of this program. Mayor Knopp asked what the associated costs would be and Mr. Sampieri replied that they had identified a minimum cost of \$85,000 per class. Mr. Vetter asked if this included construction costs and Mr. Sampieri replied that it did not because they had made the assumption that there had to be some room in the existing facilities. He noted that the cost presented was simply to deliver the instruction.

Mr. Sampieri then addressed data processing capabilities and noted that the current capabilities were inadequate to support the current data needs of curriculum and instruction. He noted that this theme was developed throughout the report and he stressed that there was an absolute need to enter the 21st Century. Mr. Miklave asked if there was a cost report related to this update and

Mr. Sampieri replied that there was and quoted an aggregate of \$1.5 million dollars. He noted that another speaker would address this issue later on this evening.

ANNETTE LAPRADE: FINANCIAL DEVELOPMENT AND PRACTICES

Ms. LaPrade stated that the budget practices that were in place were rather well structured but there was some room for fine-tuning. She advised that this would avoid the appearance of revenue and expenditure misstatement. She went on to state that the budgeting practice should be linked to the goals of the District. She commented that an integrated system should be implemented and the capabilities of the current system should be evaluated as to how they were or were not meeting the needs of the District.

Ms. LaPrade stated that when she reviewed the budget and tried to determine the cost of professional development there were no less than 6 codes. She went on to state that the recommendation was to fine-tune this practice – "slice and dice" the data to get to the true cost of programs.

Next, Ms. LaPrade discussed fringe benefits and how they consumed a steadily increasing amount of District resources. She recommended that the District aggressively pursue renegotiating to include a cost share of health insurance premiums, as there could be a savings of \$1-\$2 million dollars. She noted that there was already a premium cost share for administrative personnel. Mr. Miklave asked if the analysis looked at other districts in Connecticut and if they utilized premium cost sharing. He also asked if cost sharing had an impact on recruiting and retaining quality teachers. Mr. Jones replied that they could supply information of other districts on a national basis. Mr. Miklave replied that his concern was focused on Connecticut. Mr. Miller interjected that there was data available. Ms. LaPrade remarked that the idea was not new for the District as they were planning on a 5% cost share anyway. Ms. McCarthy asked what percentage of cost share were the \$1-\$2 million dollars of savings based upon and Ms. LaPrade replied between 5%-15%.

Mayor Knopp commented that if the City could negotiate the cost share the District would be saving the money. He pointed out that the findings had not revealed any hidden practices or extra expenses.

Mr. Vetter commented that if the union would agree to a 5%-15% cost share they would probably be asking for something in return. He added that something would have to be given up to get those savings. Mr. Jones stated that

fringe benefits should be included in the total compensation package. He went on to state that instead of separating it, consolidate it and talk about the total compensation. He pointed out that 5 years ago fringe benefits were not on the table, it was salaries and the benefits would automatically be increased based on demands.

Mayor Knopp asked Ms. LaPrade to explain how she chose the 5%-15% range and Ms. LaPrade replied that she started with 5% because that was being negotiated in the first year of the next contract. Then, she said, she went up to 10%, which was very common in government and then to be very aggressive she went up to 15%. Mr. Jones interjected that when other government agencies were reviewed 10%-15% was the norm, and that was Ms. LaPrade's basis for choosing them.

Ms. LaPrade then moved on to salaries and stated that the high cost was associated with the relatively high level of staff experience and education. She recommended that an actuarial study be performed to determine the feasibility of offering enhanced early retirement incentives.

Mayor Knopp commented that he was rather disappointed with the superficiality of the reporting. He remarked that he had hoped the team would do an initial feasibility study, instead of making a recommendation to conduct an actuarial study. He asked why one had not been done so the City would have any idea if this was worth doing. Mayor Knopp advised that the City was looking to see if this might be one solution to the high payroll and that type of study would have been very helpful. He pointed out that for the team to say the City should conduct one was not substantial enough.

Mr. Jones replied that this was part of the scope of the study. He explained that when the firm entered into the engagement and identified the scope it was not to conduct an actuarial study. He stated that they had said if they found any were needed they would include them in the report but they never intended to include it. He added that it was a very detailed study as it included not only the cost of the teachers leaving but how many needed to opt out and the effect the teacher shortage would have on this.

Mayor Knopp commented that to put a \$1-\$3 million dollar price tag on the renegotiating of fringe benefits and not put a figure on the hypothetical early retirement package, which had been done throughout the country, seemed to be a shortcoming of the report. He pointed out that they were left with a gap of what was not realistic and what they might control. Mr. Jones replied that they

could supply the City with some examples of other school districts across the country but the variables were tremendous.

Mr. Miller asked if the team looked at the census of the teacher staffing and Mr. Jones replied that they had and it was very detailed. Mr. Miller commented that by looking at the District and the recognized maturity of the teachers, the team should have some greater sense and have some indicators that this might be an area to further look at. Mr. Jones replied that they could obtain the information for the City without conducting that type of study. He added that they were not in a position to recommend this to the City because this was a policy decision. He advised that he had alerted another practice at their firm that this was an issue that the Board might have interest. Mr. Miklave asked if the additional cost was included in the document and Mr. Jones replied that it was not.

Ms. LaPrade then discussed opportunities for savings, which included indirect cost rate to maximize the revenues. Mr. Jones stated that there were a host of programs defined as special programs that should be assessed. He noted that the State had 2 reimbursement rates: restricted (4.6%) and unrestricted (17%) and they would have to negotiate with the State for implementation. He commented that at some level if these programs were assessed to the impact of the organization the money would be freed up. Mr. Vetter asked what type of special programs and Mr. Jones replied Title I. He added that the program impacted the basic operation and it affected the overall management structure. He noted that it was coming out of the same \$800,000.

Dr. Corda commented that the statement was accurate and he explained that it meant instead of \$800,000 to spend on programs there would be less than \$800,000. He stated that it reduced the level of service that could be provided in the Grant. He added that the Grant would be reduced in order to reduce the cost somewhere else. He went on to state that there was an accounting procedure used to recognize the revenue and when it was done it reduced the revenue in the Grant. Mr. Jones commented that the money would be freed up as a result of this item and that money could be used for other general education programs. He said that the policy decision would be if its' having an effect on the general program. He noted that the money would be freed up and reallocated and it would reflect the effect of these programs.

**MS. MARTHA KINCHELOE: USE OF TECHNOLOGY FOR
OPERATIONAL SUPPORT.**

Ms. Kincheloe stated that there was a dire need in just about every one of the organizational units to have better access and more easily retrievable access to data. She stated that there were technical differences between the City and the Board of Education. She explained that the individual units should be consistent and the interoperability should be maintained. She added that priorities could be made to what was important to the City and the Board of Education. She noted that there should be a common infrastructure where feasible.

Mayor Knopp commented that the City and the Board of Education had different e-mail systems and he asked Ms. Kincheloe if she were stating that type of function should be standardized. Ms. Kincheloe replied that one of the responsibilities of the organizational unit was to take that into consideration in the future. She added that the belief was that neither of the two groups was prepared for that type of consolidation. She explained that currently there were different areas of support that would not be utilized in the District Office but the school would need them. Ms. Kincheloe said that the infrastructure of the two over time should be made consistent and that would tell if it were feasible. She said that one of the roles of the organizing unit would be to report to the Mayor if a consolidation unit would increase efficiencies. She reported that the resources of the Board of Education would have to be moved over to the City to accommodate the system. She commented that if this type of action were taken there would need to be a very clear change of management plan that would deal with many different types of issues along the way as changes were being made.

Mayor Knopp commented that it seemed to him that they could renegotiate contracts for benefits but not to make the systems compatible. Ms. Kincheloe stated that it was not necessary to consolidate to achieve efficiencies and effectiveness. She noted that from the interviews that they had conducted with City personnel the practice of consolidation was somewhat questionable. Mayor Knopp stated that if this were done it would be for support not for instructional purposes. He added that this was operational technology not technology in the curriculum. Ms. Kincheloe agreed that this was true but in many instances it was difficult to separate infrastructure from what people were doing. She noted that the technicians that were on board found themselves engaged in conversation and assistance that went beyond what a PC technician would do.

Mayor Knopp commented that the recommendation was to standardize everything and consider in the end to consolidate software, hardware, and e-mail. He noted that his hope was that it would happen one way or the other.

Ms. Kincheloe replied that the report was not recommending standardizing hardware or software but that standards be put in place that individuals had to recognize. She stated that they had identified that the e-mail system was an impediment between the City and the Board of Education. She went on to state that the recommendation was for a standard e-mail address that could be recognized by both groups.

Mr. Miklave asked if the statement meant that by having these 2 IT organizations report to a common management team that efficiencies would be borne from that process even though the hardware was separate. He also asked in what way those efficiencies would be achieved and how that translated into money. Ms. Kincheloe replied that there were several recommendations made that when lumped together would be the consummate figure for savings. She added that at this point some of the savings would be hard to quantify. She remarked that currently there was no structure in place that would help make that decision. She noted that providing the interoperability would provide the efficiencies but this would not be accomplished unless the manager made decisions. She commented that they had made the recommendation that both the City and the Board of Education pursue a management municipal administrative network so that several of the Board's offices would not have one person, desk and computer to access the District's financial management system and another to access the Board's management system. She noted that there was a number of staff that had 2 computers at their desks. Ms. Kincheloe stated that the savings would come from a shared municipal network and there was some specific information regarding changes that could be made resulting in cost savings.

Ms. Kincheloe advised that there was existing hardware that did not need to be there and the schools could not have access to the Munis System because there was no bridge between the systems. She commented that the City would be overwhelmed with the manual processes that were in place now because the District did not have the capability of using the computer. She noted that they might find there would not be much savings. Dr. Corda asked if there was a limitation with the Munis System that prevented the 2 groups from exchanging information and Ms. Kincheloe replied there were none. Dr. Corda asked why there was a problem then and Ms. Kincheloe replied that the schools could not get to Munis because there was no bridge between them. Dr. Corda surmised that if Munis was software that could serve both groups needs well then the task was to ascertain how to build that bridge. He asked Ms. Kincheloe what was impeding that and she replied that decisions were the impediment. Ms. Kincheloe explained that there were numerous alternatives as to how to

accomplish this and the team had made their recommendation of the ways they felt best. She added that they felt the priority issue was to give the schools access to what Munis could do and then a lot of the manual and what appeared to be inefficient processing would disappear. She noted that then the Board of Education could operate just as effectively as the City. Ms. Kincheloe advised that the lack of access to Munis first drew their attention to it and the second thing they noticed was that so much of the data collection was being done manually.

Ms. Kincheloe then stated that at this point the 2 areas lagging were integration into the classroom and the training of staff. She stressed that they should reestablish the priority to integrate into the classroom. She went on to Finding #30 and stated that it could not be determined if the program was achieving the needed results and how much it was costing in getting there. She said that the recommendation was to implement a data warehouse and establish an e-mail directory. She pointed out that if they decided not to do this then there were some relatively simple ways in which a common directory could be used and at that point they would have many advantages of a single e-mail system.

Ms. Kincheloe then moved on to Personnel and Human Relations. She stated that she interviewed many talented and devoted people but the operation in place restricted them through a lack of software. She noted that it was labor intensive and time consuming. She commented that Munis had capabilities but they could not determine if it could do what was needed. She remarked that job descriptions were not available for all positions and they should be processed and available in a manual. Ms. Kincheloe stated that the organizational changes they suggested meant that the job descriptions would change. She noted that much of what they were stressing here was measurement. She remarked that they should decide what they had to do, measure it and then they could tell if they had gotten there. She added that it was important that the job descriptions explain what the individuals did.

Ms. Kincheloe commented on the intensity of competition for qualified teachers and recommended the development of a long-term recruitment plan. She then moved on to Operations and Maintenance. Ms. Kincheloe advised that the findings revealed that there were opportunities for cost savings and increased efficiencies. However, she added that these could be controversial as well and the decision needed to be made whether or not to tackle it. She pointed out that outsourcing the custodial function could save \$2-\$3 million dollars. She explained that it was possible to begin phasing in the outsourcing for custodial services in the area of City maintenance.

Mr. Jones interjected that using these savings to pay for the suggested increases would offset the cost savings. He advised that the outsourcing programs the firm had observed had pleased some municipalities and had not pleased others. He noted that the results were mixed. Mr. Jones remarked that the previous study that had generated this stated that efficiencies would be improved and it would be done at less cost. Mr. Vetter asked if the team had done a current analysis to arrive at the figures or if the figures were from the old study. Mr. Jones replied that they were from the old study and added that they had stated that if they had found any efficiencies they would include them in the book.

Ms. Kincheloe stated that depending upon any decisions made on outsourcing there were improvements in service that could be achieved. She went on to state that these improvements were based on District-directed supervision. With regard to transportation, Ms. Kincheloe commented that functional specifications for an integrated transportation informational management system should be developed. She stated that cost savings opportunities existed and she discussed a redistricting study. She added that an examination made with the proposed GIS system could determine the potential for improving bus routing and scheduling. She noted that there was not enough data to predict what it would do or if it would have cost savings.

Ms. Kincheloe stated that changes in eligibility rules for transportation should be explored as well as in the area of food service. She went on to state that opportunities to extend the central kitchen services to schools other than the public schools should be continued. She also recommended that an indirect overhead rate be applied to Food Services.

MR. WILKS: SCOPE OF ANALYSIS

Mr. Wilks spoke about the scope of the analysis. He stated that the second part of the work they had done involved the facilities and the Schools for the New Millennium. He went on to state that the scope was broken down into 7 tasks and he reviewed them with the assembly. His recommendation was to secure assistance in developing a comprehensive program for the renewal of the City's school facilities. He stated that the process was initiated with the Jeeter Cook & Jepson Report but it needed to be updated and implemented. He remarked that there was maintenance that was identified which should be handled in tandem or in parallel and should be merged with a total plan. Mr. Wilks commented that they had gone for a long time with an ad hoc band-aid approach to construction. He noted that they had to determine a horizon of time identified for the life of a facility. He added that they had to determine how they would

maintain the facilities from year to year because the maintenance cost was just as important as new construction costs.

Mr. Wilks then addressed the issue of fragmented organization and stated that there was an unusual situation here vis-a-vis the City and the Board of Education. He suggested that they rethink the way that they were able to commission the work on a school. He added that they needed to retain someone who was focused on construction and managing the project day-to-day. He remarked that at this point there were many fragmented opinions and input. He noted that if they knew what they were going to build, had a plan and stuck to it the work could be performed on time and within budget.

Mr. Wilks then showed a slide that demonstrated one of the favorite ways of organizing the scheme. Ms. McCarthy asked if the cost of new programs included the cost for a Director of Construction. Mr. Wilks replied that it did not but that he was not involved with the cost end. Mr. Miller pointed out that the position would be funded by the bond just as a construction manager or architect would be.

Mr. Wrenn asked if there were any special suggestions on how the organization should be redesigned and Mr. Wilks replied that the major emphasis would be having defined roles of what would be the appropriate level of input. He remarked that the Council's responsibility was relative to the cost of the project and the Board of Education's was more in the definition of the project. He noted that the mismatch here was many times as he examined the jobs there was no responsibility for the cost and the scope of the project. He stated that definition of roles would be the most important and that depended upon the talent within the organization.

Dr. Corda asked if the scope of facilities suggested any order of how projects should take place. Mr. Wilks replied that it was more important that the next level of analysis was more or less curtailed. He explained that the assessments were curtailed in a sense because they were geared into examining options for Brookside and Beacon Schools. He added that it shunted everything to a subset of the selection process. Mr. Wilks stated that the Jeeter Cooke & Jepson Report's methodology was fine but it would have to be updated.

Mr. Wilks then moved on to procedures and contracts that were currently being used and stated that they were inadequate. He noted that the previous ones that had been used did not matter because the projects had been small. He commented that as soon as the City moved into a larger project they should have a standard format that was already acceptable functionally. He pointed out

that the current contracts that they were using were from the City for street and roadwork but they needed building contracts. He stressed standardization of reports and stated that they needed maximum efficiency so they could ascertain where they were now and how they ended up. He added that it should be made as simple as possible.

Mr. Wilks commented on the existing resources and stated that there was no meaningful schedule and there was no accountability for change. He noted that larger contracts were far more complicated and the players would be far more sophisticated. Mr. Miklave asked whether the analysis identified a lack of commitment of the contractors to complete the project. Mr. Wilks replied that was correct and stated that they had a commitment to the degree that they had a contract. He added that anything less than that was deficient.

Mayor Knopp asked if there were any comments from the Council or Board of Education Members.

Mr. Sutton commented that a statement had been made that an attempt to manage the public perception was somewhat unrealistic. He remarked that he felt that given the current politics of education it might not be that far fetched. Mr. Sampieri replied that the essence of the statement was that the objective was to manage the public perception of Norwalk and pursue the Mission Statement. He commented that when they read the report they would see that an analysis of the press releases that were done did not demonstrate that they were giving reports of how Norwalk was successfully pursuing these educational goals and objectives. Mr. Sampieri remarked that perhaps it was not too far fetched to say that maybe the public perception could be managed. However, he commented that he was sharing that it was not being managed and the concept of a public service organization attempting to manage perception as opposed to providing information was an open communication linkage in that regard. He remarked that if public perception was managed it was a one-way street because information was being given but they were not receiving any back. He noted that it came down to the sensitivity to that management being a policy issue.

Mr. Kimmel commented on a statement that was made months ago that these studies typically produced savings. He remarked that he felt this report was not going to give the City that. Mr. Jones replied that it was generally accurate that this type of study did generate savings in certain areas. He said that they had spent a lot of time reviewing information of how the City's money was spent. He noted that they had high costs and it was not as if the money was being used for other things.

Mr. Sampieri commented that the District had gone through a very severe reduction in staffing over time. He noted that the report included staff performing jobs of 2 people. He added that this had been included in the job descriptions. He remarked that was why they were recommending the additional personnel and they felt that was reasonable.

Mr. Kimmel commented that the team's conclusion was that there was not a lot of waste in the Norwalk Public School System. Mr. Sampieri replied that there was not a lot of waste in the central office management system but there was in that employees were doing scores of calculations manually. He stated that the information systems were real management tools that needed to be available. Mr. Sampieri remarked that while they found no office where the staff was not working they did find a lot of staff working on inappropriate tasks. He stated that there was waste in the sense that they had been able to identify this in many other engagements.

Mr. Jones commented that the assessment was just on the central office and they had not gone out and tried to assess if there are inefficiencies in the schools. He added that in other areas it was the whole system.

Dr. Corda commented that he agreed that as they were able to become more technically sophisticated that they would become more productive. He added that when they could shift their energies and time and money to the schools they would be better. He stated that the priority of technology by the Board was rightful. He went on to state that he agreed that part of their mission was to provide public information and he submitted that part of the strategic plan that the public relations office was to manage public perception. He explained that would make the difference in people choosing to move to Norwalk or not. He stressed that he did not want this to be a reflection on the person that did the job.

Ms. Bain commented on the waste of time dealing with tasks manually. She asked if it could be a reflection that there had not been proper time devoted to staff development in the attempt to reconcile budgets. Mr. Sampieri replied that they had recommended more staff development and noted that everywhere they went that need had been expressed. Ms. Bain remarked that they really needed to recognize the importance of initial investment for long-term gain.

Mr. Cole commented on public perception and remarked that the team would be making a presentation to the general public. He stated that he felt the slide that demonstrated that the Board Members needed to increase their commitment to building projects was not applicable at this time. He noted that

there had been a significant change and the Members were committed and focused on schedules. Mr. Cole then commented on the statement made about the 29 teachers at \$50,000 each and he remarked on the conclusions an uninformed individual might make. He stressed that he hoped when the team made their presentation tomorrow night it was clearly understandable to the uninformed citizen. Then Mr. Cole stated that he would not want anyone to think that all the City had to do to save a couple million dollars was to strong arm employees into making co-payments on their health insurance premiums.

Mr. Bondi commented on 2 items that the City had focused on in the past and the team had recommended this evening. He remarked it would be better if the team had the answers on how to implement and accomplish those recommendations. He explained that the City had tried to privatize the cleaning of the buildings and had also pursued a co-payment of insurance premiums. He added that they had tried to secure a less expensive medical contract similar to what the rest of the City employees had. Mr. Bondi remarked that no one had the answer on how to make it work. Mr. Jones replied that the team would not be prepared this evening to deal with negotiation issues. He added that would be a whole other process. He reiterated that the understanding was that the scope of the study would include the mention of anything that the team observed that had the potential for savings. Mr. Jones commented that the first priority was to secure someone to assist them in negotiations. He added that this would be someone that would help them reach a common ground to reach those goals. Mr. Bondi remarked that was something they had done and he felt that the bottom line was that the team's whole process had saved no money for the City. He pointed out that the only ways they could save money according to the report had already been tried and failed.

Mr. Kimmel asked if the team had considered coverage teachers and reading specialists in their determination regarding the 29 teachers. Mr. Jones replied that they had already stated that there was a lot of unknown information. Mr. Kimmel commented that if these types of teachers were not included then the number was silly and there was no purpose in stating it. He noted that some teachers were mandated to provide services and the City had no choice.

Mr. Jones stated that they had looked at documents and teachers that were allocated for one of the schools. He went on to state that the decision point had been made for that allocation process and since they were assigned to the school they pushed those teachers aside. He commented that the other teachers were based on a ratio and that was the difference. He noted that when they saw a difference at a school they raised the question.

Dr. Corda commented that it was his understanding that the observation that was made in terms of number of staff only related to classroom teachers. Mr. Jones replied that was correct. Dr. Corda asked what would accomplish the objective of absolute division. Mr. Jones replied that it should be reviewed to ensure that the "programitization" of the school was done. He added that some principals may do well and others might not. He stated that in lieu of the fact that there were no combination classes he would still suggest a review process. He noted that they were suggesting that the process be reviewed in certain schools to determine the actual assignment versus the ratio. Dr. Corda remarked that there was a decision-making process that was made to allocate the teachers to the school and Mr. Jones replied that they had asked for details on the process early on and were supposed to get some information but they never did.

Ms. McCarthy commented that the team had interpreted the maximum allowable number of children to teachers to be the optimum, so that the class sizes would be as large as the contract allowed. Mr. Jones replied that the report represented the policies that were in place. Ms. McCarthy remarked that the policies they had in place were the maximum allowed not the optimum. Mr. Jones replied that was a decision the District was moving towards. He noted that reducing the class sizes was a decision that they had made. He remarked that all they were suggesting was that the policy needed to be reviewed. Mr. Jones commented that they had looked at the contract and compared it to the actual assignments on a given snapshot day. He stated that they raised the question if there was a policy in place since the ratio alone would not generate this.

Ms. McCarthy asked if they had asked in the course of interviewing what was the process by which staff was allocated during the budget creation process. Mr. Jones replied that they had asked if there was a policy statement and noted that the allocation was there. He added that they asked what the process was of the policy. He commented that the numbers in the budget document demonstrated that the number of teachers was different from the actual. Mayor Knopp commented that he felt there was severe overreaching in that conclusion and it affected the credibility of the report.

Mr. Avery stated that he had read through all 3 of the books and he thanked the team for them. He went on to state that they were detailed and offered an explanation that would show anyone how the money was spent. He remarked about the number of teachers over the contract minimum and how the report noted a description of where one might look. Mr. Avery stated that his interest as a Board of Estimate and Taxation Member was that all efforts were made to

meet the budgets on time and within the bottom line. He relayed how one Board had declined to follow the advise of a construction manager and that project had run substantially late and over budget. On the other hand he advised how another project had come in on time and within budget even with inflation by following the advice of the construction manager. He remarked that construction management techniques had saved the State a lot of money. Mr. Avery advised that the former structure of the School Building Committee needed to be examined and he encouraged the assembly to look at some of the recommendations.

Mayor Knopp thanked all who had attended the briefing this evening. He asked everyone to get the word out about the meeting tomorrow night.

ADJOURNMENT

**** MR. MIKLAVE MOVED TO ADJOURN THE MEETING.**

**** MOTION PASSED UNANIMOUSLY BY VOICE VOTE.**

The meeting adjourned at 10:45 p.m.

Respectfully submitted,

Ann Marie DeLuca

Telesco Secretarial Services