



Review of the Food and Nutrition Services Department of the Boston Public Schools

April 2014

Samuel DePina, Chief Operating Officer for Student Support in the Boston Public Schools (BPS), requested that the Council of the Great City Schools (CGCS) provide a high-level management review of the school district's Food and Nutrition Services Department. Specifically, he requested that the Council¹—

- Review and evaluate the leadership and management, organization, and operations of the school district's Food and Nutrition Services Department
- Develop recommendations that would help the district's food service operations achieve greater operational efficiency, effectiveness, and sustainability.

In response to this request, the Council assembled a Strategic Support Team (the team) of senior managers with extensive experience in food service operations from other major city school systems across the country. The team was composed of the following individuals. (Attachment A provides brief resumes of team members.)

- **Project Staff**

Robert Carlson, Project Director
Director, Management Services
Council of the Great City Schools

David Koch, Principal Investigator
Chief Administrative Officer (Retired)
Los Angeles Unified School District

Shirley Brooke, Director of Food & Nutrition Services (retired)
Jefferson County (Colorado) Public Schools

Michael Eugene, Chief Operating Officer,
Orange County (Florida) Public Schools

¹ The Council has conducted some 250 instructional, management, and operational reviews in over 50 big-city school districts over the last several years. The reports generated by these reviews have often been the foundation for improving the operations, organization, instruction, and management of many urban school systems nationally. These reports have also been the basis for identifying “best practices” for other urban school systems to replicate. (Attachment E lists the reviews that the Council has conducted over the last 15 years.)

Theresa Hafner, Executive Director, Enterprise Management
Denver Public Schools

Helen Phillips, Senior Director, School Nutrition
Norfolk Public Schools

The team conducted fieldwork for the project during a four-day site visit to Boston on November 19-22, 2013.² The general schedule for the site visit is outlined below. (The complete working agenda for the site visit is presented in Appendix B.³)

The team met with the Superintendent, the Deputy Superintendent of Operations, and the Chief Operating Officer on the first day of the site visit to better understand their expectations and objectives for the review. The team used the next two days of the site visit to conduct interviews with key staff members, examine documents and data, and conduct site visits. (The complete lists of individuals interviewed, sites visited, and materials reviewed are presented in Appendices C⁴ and D.⁵) The final day of the visit was devoted to synthesizing and refining the team's findings and recommendations, and to providing the Deputy Superintendent of Operations and the Chief Operating Officer with a briefing on the team's preliminary findings.

The Council sent the draft of this document to team members for their review in order to affirm the accuracy of the report and to obtain their concurrence with the final recommendations. This management letter contains the findings and recommendations that have been designed by the team to help improve the operational efficiency, effectiveness, and sustainability of the BPS food-service program.

The Boston Public Schools

The Boston Public Schools is the largest public school system in Massachusetts and the 73rd largest in the United States. The district operates 127 schools with over 57,000 students supported by over 8,000 employees. The General Fund operating budget for fiscal year 2013-14 was approximately \$934 million.

The Boston School Committee is the governing body of the Boston Public Schools. The mayoral-appointed School Committee is responsible for defining the vision, mission, and goals of the Boston Public Schools; establishing and monitoring

² The team was originally scheduled to conduct its review in October 2013, but was requested to re-schedule to November because of a conflict with the Food and Nutrition Services Department Director's calendar. This change required reconstituting portions of the review team.

³ Multiple and last-minute modifications to the agenda by the Food and Nutrition Services Department Director without the knowledge or consent of the team were disruptive to the review process. In addition, Cafeteria Managers and Satellite Leads were not notified of their meetings with the CGCS team until the day before.

⁴ While the Food and Nutrition Services Department sent the team a large volume of documents and other information, their value was significantly diminished by their late receipt.

⁵ The Council's reports are based on interviews with district staff and others, a review of documents, observations of operations, and professional judgment. The team conducting the interviews must rely on the willingness of those interviewed to be truthful and forthcoming, but cannot always judge the accuracy of statements made by interviewees.

the annual operating budget; hiring, managing and evaluating the superintendent; and setting and reviewing district policies and practices to support student achievement.

The stated mission of the BPS is: “As the birthplace of public education in this nation, the Boston Public Schools is committed to transforming the lives of all children through exemplary teaching in a world-class system of innovative, welcoming schools. We partner with the community, families, and students to develop in every learner the knowledge, skill, and character to excel in college, career, and life.”

The Superintendent of Schools is responsible to the School Committee for the effective operations of the school system, including implementation of the district’s strategic plan and the efficient management of the district’s resources.

Food and Nutrition Services Department

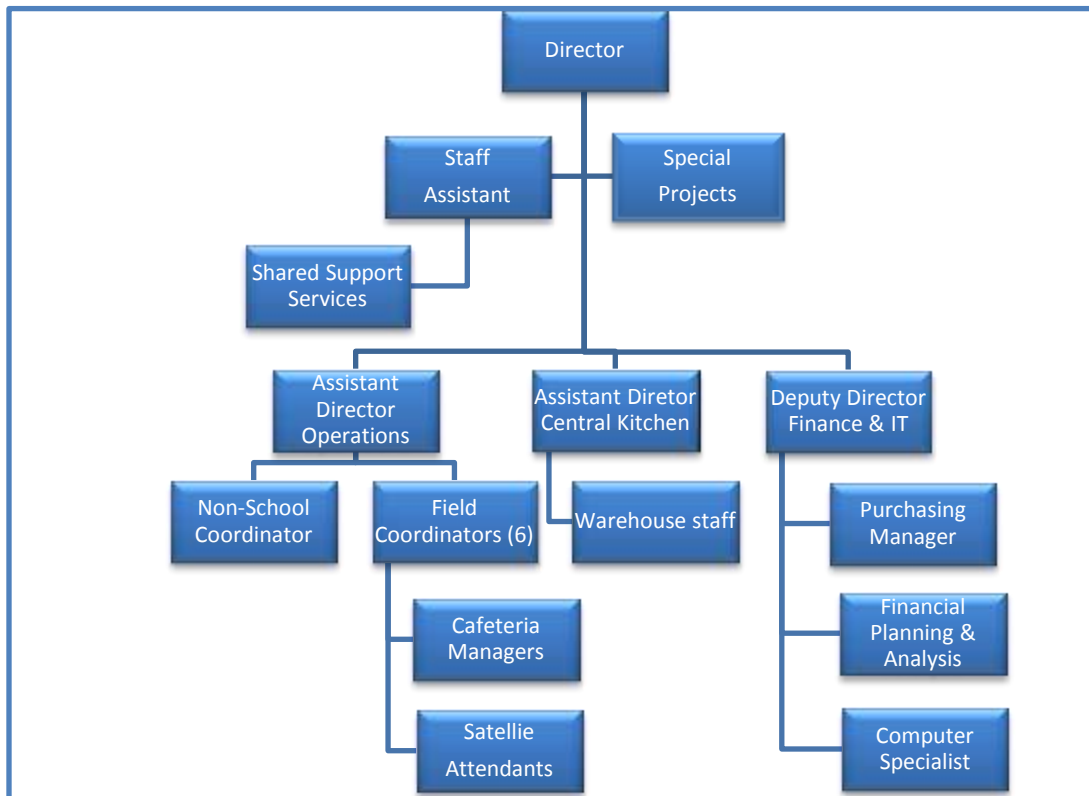
The Food and Nutrition Services Department (FNSD) provides child nutrition programs, including both breakfast and lunch, at all school sites of the Boston Public Schools. The FNSD food service delivery model includes both preparation sites and satellite locations that receive prepared meals from an outside contractor. The district also has a hybrid, central food warehouse and distribution facility.

Seventy-eight percent of BPS students are eligible for the Free and Reduced Price Meals program. This year, however, BPS is participating in the Community Eligibility Provision (CEP), which allows for more flexibility in administering the program. Through this federal program, breakfasts and lunches are available to all students in all schools at no cost, regardless of family income. Previously, families had to fill out and return forms to qualify for the meals program. By entering into the CEP, the Boston school district can waive all meal charges for all students. Parents do not need to take any action to participate in the program.

The FNSD is headed by a Director with three direct reports and two staff positions, as shown in the abbreviated organizational chart in Exhibit 1 below. The three direct line positions include the Assistant Director of Operations, with management responsibilities for all school-site food service operations through a staff of six Field Coordinators; an Assistant Director of the Central Kitchen Facility;⁶ and a Deputy Director of Finance and Information Technology, whose staff include the Purchasing Manager, the Financial Planning & Analysis manager, and a Computer Specialist. One Staff Assistant supervises the Shared Support Services group, which includes payroll, equipment, accounts payable/accounts-receivable clerks along with a computer repair technician. The other staff position is responsible for special projects.

⁶ The FNSD Central Kitchen Facility was actually closed in 2005 and only a skeletal warehousing operation remains.

Exhibit 1. Food and Nutrition Services Organization Chart



Source: Prepared by CGCS based on information obtained from BPS.

The BPS appears to have been extraordinarily tolerant of financial losses incurred by the food service program over the past several years. Exhibit 2 shows the FNSD total revenue, program loss, and loss as a percentage of total revenue for the past eight years. The loss per year averages over 10 percent during this period and the cumulative loss during this period amounts to over \$21 million. These losses represent a substantial encroachment on the general fund.

Exhibit 2. FNSD Revenues, Losses, and Losses as a Percentage of Revenues for the School Years 2006-07 to 2013-14 (Projected)⁷

School Year	Total Revenue \$ millions	Net Loss \$ millions	Loss as Percentage of Revenue
2006-07	\$23.1	\$1.7	7.4%
2007-08	22.8	3.7	16.2
2008-09	23.9	3.5	15.3
2009-10	25.9	1.4	5.4

⁷ While this information was provided by the Office of the Chief Financial Officer and is presumed to be accurate, the team received differing and conflicting financial information from the district and the department.

2010-11	26.0	2.0	7.6
2011-12	28.9	1.7	5.9
2012-13	29.1	3.6	12.4
2013-14 (Projected)	31.9	3.5	11.0

Source: Prepared by CGCS from information provided by BPS

Findings and Observations

The findings and observations of the Council’s Strategic Support Team are organized into four general areas: Commendations, Leadership and Management, Organization, and Operations.

Commendations

- The team noted that many of the FNSD staff appeared to be hard-working, competent, dedicated to the service of students, and eager to embrace new ideas for improving their systems and processes.

Leadership and Management

- The school district’s tolerance of the financial losses incurred by the food service program over the past several years (see Exhibit 2 above) may reflect a lack of organizational will to address the underlying structural issues within the program.
- The FNSD has created what appears to be a hostile work environment. For example –
 - Departmental morale was extraordinarily low at virtually all levels and many managers and employees feel isolated, unappreciated, and disrespected.
 - The department’s leadership style was described as “management by intimidation.”
 - Several employees became extremely emotional during the team’s interviews (which they attributed to job stress); others refused to speak to the team, apparently out of fear of reprisal.
 - The alleged public disciplining of employees appeared to be aimed at embarrassing them rather than changing behavior.
 - The team was told of mid-level managers being reprimanded for initiating actions clearly within their areas of responsibility.
 - Some Cafeteria Managers told the team that they have been threatened with reprimands for asking too many questions.

- The department suffers from poor communications at all levels. For example –
 - There is a lack of regularly scheduled meetings at all levels.
 - Meetings that are held lack agendas and are not designed to identify and resolve issues.
 - It was reported that phone call and e-mail inquiries from school-site employees to the central FNSD office often are not answered.
 - Many employees were unaware of the functions and processes of other units in the department.
 - School site Cafeteria Managers complained that their biggest issue was lack of communications.
 - Cafeteria Managers do not consider themselves part of the management team.
 - Menu changes are not always communicated in advance.
 - The team heard multiple reports of the failure to report information to the central office because fax machines being out of toner.
- The department has no strategic business plan with stated goals, objectives, tasks, timelines, costs and accountabilities. To illustrate –
 - While the Director advised the team that he had engaged a consultant to develop a business plan for the department, the engagement letter from the firm did not reflect development of a plan in its deliverables.
 - On the final day of interviews, after multiple requests by the team, the Director presented the team with a document that he represented to be his business plan. This document clearly demonstrated his lack of understanding of the concepts, elements, and mechanics of a departmental business plan. To illustrate, this plan is displayed in its entirety on the next page as Exhibit 3.
- There is no capital plan for the FNSD which, if based on a comprehensive facilities assessment or Facilities Condition Index, would outline the food service plant and equipment requirements--both current and future.
- The department has no marketing plan to promote participation in the food service program.
- The department has no ongoing process-improvement program to encourage innovation and efficiency.

Exhibit 3, FNSD’s “Strategic Business Plan”

One-Year Plan:

Establish a strong baseline operation for participation in Community Eligibility Option (CEO) throughout the approval period of CEO.

Prepare for new Administrative Review (Healthy Hunger Free Kids Act 2010 incorporating May 2013 6-Cent Certification Validation anticipating January 2014 Department of Elementary and Secondary Education visit.

Prepare new RFP for vended meals to be advertised, followed by review of technical proposals, recommendation of successful technical proposal to review price proposal. Final recommendation to interim Superintendent followed by final recommendation to Mayor Elect.

Review, develop and implement department processes and procedures to achieve departmental standardization. Develop team and celebrate achievements and successes.

Three-Year Plan:

Stay on course; assist other districts with challenges, successes, and anomalies with CEO, as a respected district.

Ensure accurate, meaningful data and data integrity to benchmark strengths and weakness for ongoing course action.

Source: Reproduced from the document presented by the FNSD Director.

- The department does not measure customer satisfaction or actively seek student input into menu planning.
- An over-reliance on outside management consultants may reflect departmental leadership’s inability to identify and resolve FNSD issues.
- The FNSD management is not data-driven; and business analytics and performance metrics are not used to manage the operation or to guide decision-making. For example –
 - Field Supervisors do not use financial, meal count, participation, or other operational data from current systems or reports to examine the performance of school cafeterias.
 - There are no school-level profit and loss financial statements.
 - Staffing formulas for school cafeterias are loosely based on ranges. To illustrate –
 - Preparation sites are staffed based on meals-per-hour ranging from 18 to 24.

- Pre-plated sites are staffed based on meals-per-labor-hour of 30 to 50.
- Extenuating circumstances leading to higher staffing levels are not documented or quantified.
- Decisions are made without the involvement of or input from stakeholders. To illustrate --
 - The Community Eligibility Provision initiative was implemented without fully considering the program’s requirements, such as the scalability of existing infrastructure and staffing.
 - Management was described as “top down” and “my way or the highway.”
 - The team saw no evidence of teamwork or collaborative planning or problem solving.
- The FNSD management has failed to adequately address audit exceptions identified in the most recent (2011) Coordinated Review Effort (CRE),⁸ and the department has not adequately prepared for an upcoming 2014 review.
- Internal controls within FNSD are generally weak or non-existent. To illustrate--
 - There are no profit and loss statements at the school level.
 - The oversight of the pre-plated meal program is inadequate. For example –
 - No single district person or position is accountable for the supervision of the contractor.
 - The district does not attempt to reconcile the meals delivered and served with the meals billed by the contractor.
 - Food shipments to preparation sites are not reconciled to menus and meal counts.
 - Schools order some items directly from vendors without district oversight (e.g., milk purchases).
 - Product substitutions are not controlled for quality or cost.
 - Payroll is based on “anticipated” time and there is frequently no evidence of review and approval by supervisors of time sheets.

⁸ A Coordinated Review Effort (CRE) is a standardized review process developed by the United States Department of Agriculture that includes a comprehensive on-site evaluation of a school food authority’s participation in the National School Lunch Program and the School Breakfast Program.

- It was reported to the team that cash receipts at schools go uncollected for up to a full year.
- It was unclear whether all direct and indirect costs associated with the food program are charged back appropriately to the FNSD.⁹
- Cafeteria Managers, Satellite Leads, and school-based food-service workers are in the same collective bargaining unit, resulting in an inability to establish effective supervisory relationships among these classes of employees.
- There is a general lack of training and staff development throughout the organization and the training conducted by the Director appeared to be “ad hoc” and poorly planned.
- The Special Projects unit pursues grant funding initiatives without an overall plan or departmental direction, which may result in ongoing cost implications for the district and can distract from the FNSD’s primary focus.

Organization

- The FNSD does not have people with the appropriate skill sets, backgrounds, and training in several key management positions.
- The FNSD organization chart presented to the team emphasizes support functions under the Deputy Director, Finance and IT, while it understates the importance of the core positions in the Operations arm of the organization (e.g., Field Supervisors, Cafeteria Managers, and Satellite Leads).
- The team noted several reporting relationships that were less than optimal. For example –
 - The Equipment Coordinator, who is responsible of the maintenance of all school cafeteria equipment, reports to the Purchasing Manager rather than the Assistant Director of Operations.
 - Menu planning, a function integral to cost control and quality assurance, reports to the Purchasing Manager, understating its importance to the enterprise.
- Job responsibilities are not clearly defined. For example --
 - Field Supervisors view their responsibilities broadly as encompassing operations, finance, marketing, and technology while their manager views

⁹ The Team was advised that certain costs are distributed to the food service program according to a study-based formula established a number of years ago. Nonetheless, the Team noted charges to the program that were apparently not allocated in accordance with the formula.

their duties as primarily related to personnel functions, such as school-level staff assignments and discipline.

- The Shared Support Services group of clerical staff appears to have redundant responsibilities with school-level staff in several areas, including work orders, purchasing, and payroll activities.

Operations

- Many systems are paper-driven and personnel-intensive. For example –
 - Payroll data in the form of sign-in sheets (that used to be keyed into the system from school sites) are now faxed to the FNSD central office where it is entered into the system by hand.
 - Most vendor invoices are paid using paper-based voucher packages rather than the district's ERP system.
 - Access to district ERP systems is reported to be slow and cumbersome.
 - Some staff reported significant delays in gaining security access to the ERP system in order to perform their duties.
- It was reported to the team that the FNSD has failed to take advantage of its full allotment of USDA commodities.
- Competitive sales from student stores, vending machines, and bake sales are reportedly not being controlled.
- The department has no formal system for the evaluation of vendors.
- Pre-plated meals are perceived to be of lower quality, have less variety, and contain too many cold components.
- The team had the following observations about the district's menu planning –
 - School Cafeteria Managers have little input into the menu-planning process.
 - Menus are apparently planned without regard to labor costs.
 - The department does not perform pre and post costing out of menus.
 - Products called for in menus reportedly are frequently unavailable.
- The central warehouse and distribution center (formerly the Central Kitchen Facility) is inefficient due to its layout and the age and condition of equipment.

- FNSD does not have a well-designed allergen program leaving students vulnerable and Point of Sale (POS) terminals are not being used to alert cashiers to student allergies and special dietary requirements.
- It was reported that earned pay-rate increases are not implemented on a timely basis and that bids are not conducted for open positions (as provided for in labor agreements).
- The team saw no evidence that there is a preventive maintenance program for cafeteria equipment.

Recommendations

1. Address the underlying structural issues in the food service operation, which have resulted in years of ongoing financial losses in the program. For example –
 - a. Adopt and implement labor standards based on a fixed “actual meals-per-labor-hour formula” and require documentation of any extenuating circumstances that may lead to a formula exception.
 - b. Better control food costs through a stronger menu-planning process.
 - c. Enhance internal controls over operations, including greater oversight of contractors and suppliers, improved review and approval of payroll time and attendance, and more timely collections of cash receipts.
 - d. Eliminate overlapping and redundant duties between field and central clerical staff.
 - e. Make greater use of technology available through the district’s ERP, the department’s Point-Of-Sale system, and “back of the house” systems.
 - f. Fully utilize federal commodities to reduce food costs.
 - g. Enforce federal rules and regulations relating to competitive food sales.
 - h. Close the district’s central food service supplies warehouse operation.
2. Investigate the conditions that may be creating a hostile work environment in the FNSD and take appropriate actions to address the issues.
3. Evaluate management personnel in the department to ensure that people with the applicable background, experience, training, and skill sets are in the appropriate positions.
4. Reconfigure the department’s organization to reflect the core importance of Operations and assign key operational support positions, such as the Equipment Coordinator and the Menu Planner, to the Assistant Director of Operations.

5. Create a strategic business plan with stated goals, objectives, Key Performance Indicators (KPIs), tasks, timelines, costs and personnel accountabilities.
6. Develop a capital plan based on a comprehensive facilities assessment that outlines the FNSD's plant and equipment requirements.
7. Develop a focus on meal quality and appeal as the core value of the department and the central means for attracting and retaining customers.
8. Establish a marketing plan to promote participation in the food service program.
9. Institute an on-going process improvement program to encourage innovation and efficiency.
10. Develop an ongoing comprehensive and coordinated staff development and training program for departmental employees at all levels.
11. Transform the FNSD into a data-driven organization by instituting business analytics and performance metrics using core-enterprise information, such as –
 - a. School-level profit and loss statements
 - b. Comparative participation data
 - c. Documented formula-driven staffing levels.
12. Establish a collaborative model for decision-making within the FNSD organization.
13. Improve internal communications through regular, well-planned, and interactive staff meetings at all levels.
14. Measure customer satisfaction and actively seek student input into menu planning on a regular basis.
15. Address audit exceptions identified in the most recent CRE review in preparation for the upcoming 2014 review.
16. Review direct and indirect costs to ensure the food-services program is being charged appropriately.
17. Take steps to ensure employees and their supervisors are not in the same collective bargaining unit.
18. Limit the pursuit of grant-funded initiatives to those that are consistent with the department's business plan and are supportive of the food service program's objectives.

19. Clearly define the job responsibilities of the Field Supervisors so they encompass an enterprise-wide view of operations, including finance, marketing, technology, and personnel management.
20. Implement a systematic method for the evaluation of vendors, contractors, and suppliers. Ensure that contracts have accountability clauses.
21. Establish standards for menu planning that incorporate quality, nutritional, time, labor, equipment, and cost parameters.
22. Establish an allergen program that contains processes to easily identify students with special dietary requirements.
23. Institute procedures to ensure compliance with collective bargaining agreements relating to placement on pay-rate schedules and job-opening bids.
24. Establish a preventive maintenance program for food service equipment.
25. Establish a plan to boost production to meet the anticipated increased demand generated by the CEP program.

ATTACHMENT A. STRATEGIC SUPPORT TEAM

Robert Carlson

Robert Carlson is Director of Management Services for the Council of the Great City Schools. In that capacity, he provides Strategic Support Teams and manages operational reviews for superintendents and senior managers; convenes annual meetings of Chief Financial Officers, Chief Operating Officers, Transportation Directors, and Chief Information Officers and Technology Directors; fields hundreds of requests for management information; and has developed and maintains a Web-based management library. Prior to joining the Council, Dr. Carlson was an executive assistant in the Office of the Superintendent of the District of Columbia Public Schools. He holds Ed. D. and M.A. degrees in administration from The Catholic University of America; a B.A. degree in political science from Ohio Wesleyan University; and has done advanced graduate work in political science at Syracuse University and the State Universities of New York.

David W. Koch

David Koch is the former Chief Administrative Officer for the Los Angeles Unified School District (LAUSD). The LAUSD is the nation's second largest public school system, with more than 700,000 students in grades K-12, an annual budget of more than \$9 billion, and more than 80,000 full- and part-time employees. Mr. Koch's responsibilities encompassed virtually all non-instructional operations of the District, including finance, facilities, information technology, and all of the business functions. Mr. Koch also served the LAUSD as Business Manager for over ten years, Executive Director of Information Services, and Deputy Controller. Mr. Koch was also Business Manager for the Kansas City, Missouri Public School District and was with Arthur Young and Company prior to entering public service. He is a graduate of the University of Missouri and a Certified Public Accountant in the states of California, Missouri, and Kansas. Currently a resident of Long Beach, California, Mr. Koch provides consulting services to public sector clients and companies doing business with public sector agencies.

Shirley Brooke

Shirley Brooke is the former Director of Food and Nutrition Services for the Jefferson County Public Schools (JCPS) in Colorado. JCPS is an 800 square mile school district with 85,000 students enrolled at 140 service sites. The district serves 65,000 lunches, 15000 breakfast, snack and a la carte meals to students daily, with an annual budget for Food Services of \$21 million and over 500 full and part time employees. JCPS Food Services operates a full service warehouse and distribution facility and manages all FS equipment repair services. Ms. Brooke was in Jefferson County Schools for 20 years including 8 as the Director, with Denver Public Schools for 5 years and with Jefferson County Adult and Child Care Food Program for 5 years. She is a graduate of Colorado

State University with a BS in Food Science and Nutrition. Shirley Brooke is currently a consultant with Alliance for School Food Service Leadership.

Michael Eugene

Michael Eugene is the Chief Operating Officer for the Orange (Florida) County Public Schools. In that capacity he leads Food & Nutrition Services, Transportation, Information Technology, Safety & Security, Procurement & Contracts, Warehouse Operations, and Building Code Compliance. Prior to joining Orange County he was Business Manager for the Los Angeles Unified School District. Mr. Eugene also served as the Chief Operating Officer for the Cleveland Metropolitan School District. Mr. Eugene serves in a voluntary capacity as co-director of the CGCS “Managing for Results” KPI Program. Before joining public education, Mr. Eugene was a management consultant in the private and not-for-profit sectors specializing in performance measurement, benchmarking, and public budgeting. Mr. Eugene holds a master’s degree in public administration.

Helen Phillips

Helen Phillips is the Senior Director of School Nutrition for Norfolk Public Schools in Virginia and administers six federal food programs to the over 33,000 students of Norfolk across 52 school sites. The district has 66% of students approved for free or reduced price meals and serves over 14,000 breakfasts and over 22,000 lunches daily. School Nutrition operates a full warehouse and has a fleet of six refrigerated trucks that deliver to all schools every day. The department has an annual operating budget of \$17 million and 350 full and part time employees. Ms. Phillips has worked in school nutrition for twenty-one years, eighteen in Norfolk Public Schools. She is a past president of the School Nutrition Association.

Theresa Hafner

Theresa Hafner is the Executive Director of Food and Nutrition Services for the Denver Public Schools which has a district enrollment of over 80,000 students at 137 service sites, with 68% approved to receive free or reduced-price meal benefits. Denver Public Schools serves over 61,500 breakfasts, lunches and a la carte meals to students daily with an annual operating budget of almost \$40 million and over 600 full and part-time employees. Ms. Hafner has been with Denver Public Schools for over 18 years. Ms. Hafner holds a master’s degree in organizational leadership.

ATTACHMENT B. WORKING AGENDA

**Strategic Support/Technical Assistance Team
Food & Nutrition Services
Boston Public Schools
November 19-22, 2014**

Contact: **Sam DePina**
Assistant Chief Operating Officer, Student Support
Boston Public Schools
sdepina@boston.k12.ma.us
617-635-9643 Office
617-594-7341 Cell

Working Agenda
Subject to Change as Required

Tuesday, November 19

Team Arrival
Hyatt Regency
One Avenue de Lafayette
Boston, MA 02111
617.912.1234

6:15 p.m.

Team to Meet in Hotel Lobby

6:30 p.m.

Dinner Meeting
TBD

Sam DePina
Assistant Chief Operating

Officer

Others (TBD)

Wednesday, November 20

7:00 - 7:45 a.m.

Continental Breakfast
Room TBD

Requirements
Internet Connectivity
LCD Projector

8:00 - 9:15 a.m.

Team Interview

Michael Peck
Director, Food & Nutrition Services

9:30 - 10:30 a.m.

Team Interviews

Monica Titley-Smith
Assistant Director, Operations

10:45 - 11:45 p.m.

Team Interviews

Milton Lashus
Assistant Director, CFK

12:00 - 1:00 p.m.

Working Luncheon

1:00 - 2:00 p.m.

Team Interviews

Deborah Ventricelli
Deputy Director, Finance & IT

Review of the Food and Nutrition Services of the Boston Public Schools

		<p>Keree Simmons Mgr., Financial Planning & Analysis</p> <p>Noreen Brown Accounting Coordinator</p>
2:15 - 3:15 p.m.	Team Interviews	<p>Smantha Weiss Mgr., Meal Planning, Special Diets</p> <p>Kim Szeto F2S Coordinator</p> <p>Mackenzie FFVP Coordinator</p>
3:30 - 4:30 p.m.	Team Interviews	<p>Philip Frehil Purchasing Manager</p> <p>Kimberly Andrade Inventory Manager</p> <p>Billy Grubbs Equipment Coordinator</p>
4:45 - 5:30 p.m.	Team Interviews	<p>Trish Chane Computer Specialist</p>
2:15 - 3:15 p.m.	Team Interviews	<p><u>Will Morgan</u></p> <p><u>Vanessa W.</u></p> <p><u>Mary H.</u></p> <p><u>Maureen D.</u></p> <p><u>Kachine H.</u></p> <p><u>Louise D.</u> Inventory Management</p>

5:30 p.m.	Team Discussion of Work Plan for Balance of Site Visit
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Thursday, November 21

7:00 - 7:45 a.m.	Continental Breakfast	
8:00 - 8:45 a.m.	Team Interview	<p>Catherine Smith Head Payroll Clerk</p> <p>Maria Pinto Senior Acc't Clerk</p>
9:00 - 9:45 a.m.	Team Interviews	<p>Eva Gonzales</p> <p>Vanessa Whittaker</p> <p>Denise Davis</p> <p>Mary Hern</p> <p>Maureen Deheny</p> <p>Kachine Henderson Principal Acct. Clerks AP/AR</p>
10:00 -	Site Visits	

Review of the Food and Nutrition Services of the Boston Public Schools

The Team, divided into groups of 2 accompanied by a Field Coordinator, will leave the Central Food Facility to conduct site visits to randomly selected cafeterias

1:00 - 2:00 p.m.	Working Luncheon	
2:00 - 3:00 p.m.	Team Interviews	<u>Elementary & Secondary Cafeteria Managers</u>
3:15 - 4:30 p.m.	Team Interview	<u>Randomly Selected Principals</u>
4:45 p.m.	Team Discussion of Work Plan for Balance of Site Visit	

Friday, November 22

7:00 - 7:30 a.m.	Continental Breakfast	
7:30 - 12:00 Noon.	Team Meeting	Discussion of Findings &
Recommendations		
12:00 - 1:00 p.m.	Working Luncheon	Sam DePina Assistant Chief Operating Officer Others (TBD)
1:00 p.m.	Adjournment & Departures	

ATTACHMENT C. DOCUMENTS REVIEWED

While the Food and Nutrition Services Department sent the team a large volume of documents and other information, their value was significantly diminished by their late receipt.

- Reform of Food Service Operation, Rappaport Institute of Greater Boston, August 4, 2004
- RFQ, Construction of a New Central Kitchen for the Boston Public Schools, 2007
- HHFKA Readiness Assessment and Consulting Proposal Food & Nutrition Services, inTEAM Associates, 2012
- InTEAM Technical proposal Response to RFP #842 for Consultant Services for Food and Nutrition Services, for Menu Analysis and Compliance.
- InTEAM Pricing Proposal for Consultant Services for Food and Nutritional Services, For Menu Analysis and Compliance – Response to RFP #842
- InTEAM Consulting Services Agreement and Statement of Work, undated)
- InTEAM Statement of Work #2, October 11, 2013
- Vending Meal RFP timeline, September 23, 2013
- FNS Expenses Summary: FY14 Budget Projections, CFO's Office, 8/29/2013
- RFP for Consult Services related to USDA "6 cents certification" reimbursement
- Budget FY14 FNS ALL
- 2011-2012 Food Services Survey (GCGS – ActPoint KPI)
- Reporting Absence, November 8, 2013
- Appearance Standards (Undated)
- Back To School (Undated)
- Board of Health (Undated)
- Internal Food Temperature (Undated)
- Management Positions, *listing of* (Undated)
- Meal Components (Undated)
- Mission Statement (Undated)
- Money Collection (Undated)
- Monthly food Inventory (Undated)
- Monthly Weekly Orders (Undated)
- Operation Procedures for Satellite Attendants (Undated)
- Ordering (Undated)
- Personnel Policies (Undated)
- Responsibilities Principals-Headmaster (Undated)
- Safety (Undated)
- Satellite Breakfast Handling Policy (Undated)

- Satellite Heating Procedure (Undated)
- Satellite Lunch Handling Policy (Undated)
- Nutrition Policy And Guidelines – Vending Machines, A La Carte And Competitive Foods, School Year 2011-2012, November 12, 2011
- Boston Public School Recipes, SY 2013-2014
- Boston Public Schools Menus, October – November 2013
- BPS Farm to School Initiative, November 6, 2013
- USDA Fresh Fruit and Vegetable Program in Boston Public Schools November 6, 2013
- Food Allocation/Acceptance Notice, Jan-2012 Offer
- AFSCME Contract, 2010-2013, April 3, 2013
- Site Coordinator Assignments, SY 13-14
- BASAS Contract, September 1, 2013-August 31, 2016
- BASAS Salary Grid, Effective November 1, 2013
- Management Salary Grid (Undated)
- Summary of Employee Benefits, 10.22.13
- Whitson’s Staff Assignments (Undated)
- Job Descriptions-
 - 1A Satellite Attendant
 - 1B Satellite Attendant
 - Assistant Director Food Service
 - Cafeteria Attendant
 - Cafeteria Manager
 - Cafeteria Manager
 - Coordinator
 - Director
 - Field Coordinator
 - Food and Nutrition Services –Accounts Coordinator
 - Inventory and Commodity Manager
 - J. Coordinator
 - Manager
 - New Inventory and Commodity Manager
 - Outside School Hours Coordinator
 - Senior Financial Analyst
- Extended Stock Status- All Sites, 10/13/2013
- Site Monthly Inventory Guide 2013-2014
- 2011 CRE Review Report, Review Dates: January 17-25 & 27-31, 2012
- 2012 CRE Review, December 2012
- Boston PS CRE Response 07/08/13

- Contracts:
 - Costa Produce
 - Costa Grocery
 - Eastern Bakers
 - Fantini
 - Garelick
 - Harbor Foods
 - Heartland
 - Kittredge
 - Whitson's
- Meal Prices 2010-2011
- Whitson's Price increase Letter 2013
- 2010-2011 Commodity Entitlement Dollars
- Advance Pierre Commodity Calculator, SY 13-14
- Increase in USDA Foods Assessment Fees, November 17, 2011
- Increase in USDA Foods Assessment Fees, May1, 2012
- Bosco's Pizza Co., Summary End Product Data Schedule, 11/15/2012
- Sponsor Entitlement Summary, FY 2014
- Sponsor Entitlement Summary, FY 2013
- Sponsor Entitlement Summary, FY 2012
- Sponsor Entitlement Summary, FY 2011
- Broker Information
- Commodity Balance Draw-Down, 5/24/2011
- Diverted Commodity Pounds Comparison –SY11 vs. SY12
- DoD Fresh Commitment, FY 2014
- ES Foods Commodity Calculation, SY 2014
- High Liner Food (USA) Inc., Summary End Product Data Schedule, 11/20/2012
- High Liner Food (USA) Inc., Commodity Calculation & Survey, SY 2014
- Integrated Commodity Calculation, SY 2014
- JTM Food Group, Delivery Schedule for SY 12-13
- Lings 2013-14 Commodity Calculator
- Schwan 2013-14 Commodity Calculator
- Trident 2013-14 Commodity Calculator
- Tyson MA Commodities Items, 2013-14
- Tyson Summary End Product Data Schedule, 12/17/2012
- Warehouse Delivery Rates Per Case, SY 2013-2014
- Catering for City Hall, 2011-12
- Catering for Community Centers, 2011-12
- SFSP Claims

- Aug 2011
- July 2011
- June 2011
- National School Nutrition Programs Reimbursement Rates for Fiscal Year 2014, August 9, 2013
- 2013-2014 Projected Budget
- Financial Summary 2011-2012
- Reimbursement, FY 11-12
- Reimbursement, FY 12-13
- BPS Food & Nutrition Services, Statement of Revenue and Expenses, FY 07 through FY 13
- Wilmington Cold Storage Fees, August 19, 2010
- 6 Cents Certification, Deferred Worksheets
- High School Cafeteria Breakfast & Lunch Menu, May 2013
- High School Cafeteria Lunch Worksheet, May 2013
- High School Food Authority Profile and Attestation, 6/20/2013
- K-8 Cafeteria Breakfast & Lunch Menu, May 2013
- K-8 Cafeteria Lunch Worksheet, May 2013
- K-8 School Food Authority Profile and Attestation, 6/20/2013
- Sites Menu 6 Cents Week, May 6 2013

**ATTACHMENT D. DISTRICT PERSONNEL INTERVIEWED AND
SITES VISITED**

- John McDonough, Superintendent
- Joseph Shea, Deputy Superintendent of Operations
- Sam DePina, Assistant Chief Operating Officer
- Michael Peck, Director
- Deborah Ventricelli, Deputy Director, Finance &IT
- Kimberly Szeto, Farm to School Coordinator
- Mackenzie Sehlke, Fresh Fruit and Vegetable Program
- Nancy Fisher, Special Projects
- Milton Lashus, Assistant Director, CKF
- Kachine Henderson, Order Placement
- Ellen Jackson, Equipment Repairs
- Eva Gonzales, Accounts Payable
- Catherine Smith, Payroll
- Denise Davis, Whitson's Satellite Food Orders
- Keree Simmons, Financial Planning & Analysis
- Noreen Brown, Accounting Coordinator
- Bill Grubbs, Equipment Coordinator
- Phillip Frehil, Purchasing Manager
- Monica Titley-Smith, Assistant Director, Operations
- Veneice Smith McCain, Field Coordinator
- Margorie Pietrowski, Field Coordinator
- Patricia Courteau, Field Coordinator
- Laura Kozar, Field Coordinator
- Arthur Carvalho, Field Coordinator
- Monique Pruitt, Field Coordinator
- Linda Kielczweski, Cafeteria Manager
- Heidi Rivera, Cafeteria Manager
- Kathy Carncey, Cafeteria Manager
- Dale Feeney, Cafeteria Manager
- Dianna Piccarini, Cafeteria Manager
- Debra Franks, Cafeteria Manager
- Margaret Palmisano, Cafeteria Manager
- Carol Melanson, Cafeteria Manager
- Barbara Deocoteaux, Cafeteria Manager
- Mary Rose Gudetko, Cafeteria Manager
- Rosemarie Lyons, Cafeteria Manager
- Jennie Null, Cafeteria Manager

Site Visits

- Central Warehouse
- King K-8 School
- Dearborn Middle School
- Holland Elementary School
- Burke High School
- Mather Elementary School
- Fredrick Middle School
- Haley Elementary School

ATTACHMENT E. COUNCIL REVIEWS

Council of the Great City Schools

The Council of the Great City Schools is a coalition of 66 of the nation's largest urban public school systems. Its board of directors is composed of the superintendent of schools and one school board member from each member city. An Executive Committee of 24 individuals, equally divided in number between superintendents and school board members, provides regular oversight of the 501(c) (3) organization. The mission of the Council is to advocate for urban public education and assist its members in the improvement of leadership and instruction. The Council provides services to its members in the areas of legislation, research, communications, curriculum and instruction, and management. The group convenes two major conferences each year; conducts studies on urban school conditions and trends; and operates ongoing networks of senior school district managers with responsibilities in areas such as federal programs, operations, finance, personnel, communications, research, and technology. The Council was founded in 1956 and incorporated in 1961 and has its headquarters in Washington, DC.

History of Council Strategic Support Teams

City	Area	Year
Albuquerque		
	Facilities and Roofing	2003
	Human Resources	2003
	Information Technology	2003
	Special Education	2005
	Legal Services	2005
	Safety and Security	2007
	Research	2013
Anchorage		
	Finance	2004
	Communications	2008
	Math Instruction	2010
	Food Services	2011
	Organizational Structure	2012
Atlanta		
	Facilities	2009
	Transportation	2010
Austin		
	Special Education	2010
Baltimore		
	Information Technology	2011
Birmingham		
	Organizational Structure	2007
	Operations	2008
	Facilities	2010
Boston		
	Special Education	2009
	Curriculum & Instruction	2014
	Food Service	2014
Bridgeport		
	Transportation	2012
Broward County (FL)		
	Information Technology	2000
	Food Services	2009
	Transportation	2009
	Information Technology	2012
Buffalo		
	Superintendent Support	2000
	Organizational Structure	2000
	Curriculum and Instruction	2000
	Personnel	2000
	Facilities and Operations	2000
	Communications	2000
	Finance	2000
	Finance II	2003

Review of the Food and Nutrition Services of the Boston Public Schools

	Bilingual Education	2009
	Special Education	2014
Caddo Parish (LA)		
	Facilities	2004
Charleston		
	Special Education	2005
Charlotte-Mecklenburg		
	Human Resources	2007
	Organizational Structure	2012
	Transportation	2013
Cincinnati		
	Curriculum and Instruction	2004
	Curriculum and Instruction	2009
	Special Education	2013
Chicago		
	Warehouse Operations	2010
	Special Education I	2011
	Special Education II	2012
	Bilingual Education	2014
Christina (DE)		
	Curriculum and Instruction	2007
Cleveland		
	Student Assignments	1999, 2000
	Transportation	2000
	Safety and Security	2000
	Facilities Financing	2000
	Facilities Operations	2000
	Transportation	2004
	Curriculum and Instruction	2005
	Safety and Security	2007
	Safety and Security	2008
	Theme Schools	2009
Columbus		
	Superintendent Support	2001
	Human Resources	2001
	Facilities Financing	2002
	Finance and Treasury	2003
	Budget	2003
	Curriculum and Instruction	2005
	Information Technology	2007
	Food Services	2007
	Transportation	2009
Dallas		
	Procurement	2007
	Staffing Levels	2009
Dayton		
	Superintendent Support	2001
	Curriculum and Instruction	2001

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	Finance	2001
	Communications	2002
	Curriculum and Instruction	2005
	Budget	2005
	Curriculum and Instruction	2008
Denver		
	Superintendent Support	2001
	Personnel	2001
	Curriculum and Instruction	2005
	Bilingual Education	2006
	Curriculum and Instruction	2008
Des Moines		
	Budget and Finance	2003
	Staffing Levels	2012
	Human Resources	2012
Detroit		
	Curriculum and Instruction	2002
	Assessment	2002
	Communications	2002
	Curriculum and Assessment	2003
	Communications	2003
	Textbook Procurement	2004
	Food Services	2007
	Curriculum and Instruction	2008
	Facilities	2008
	Finance and Budget	2008
	Information Technology	2008
	Stimulus planning	2009
	Human Resources	2009
Fresno		
	Curriculum and Instruction	2012
Greensboro		
	Bilingual Education	2002
	Information Technology	2003
	Special Education	2003
	Facilities	2004
	Human Resources	2007
Hillsborough County (FLA)		
	Transportation	2005
	Procurement	2005
	Special Education	2012
Houston		
	Facilities Operations	2010
	Capitol Program	2010
	Information Technology	2011
	Procurement	2011
Indianapolis		
	Transportation	2007

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	Information Technology	2010
Jackson (MS)		
	Bond Referendum	2006
	Communications	2009
Jacksonville		
	Organization and Management	2002
	Operations	2002
	Human Resources	2002
	Finance	2002
	Information Technology	2002
	Finance	2006
Kansas City		
	Human Resources	2005
	Information Technology	2005
	Finance	2005
	Operations	2005
	Purchasing	2006
	Curriculum and Instruction	2006
	Program Implementation	2007
	Stimulus Planning	2009
Little Rock		
	Curriculum and Instruction	2010
Los Angeles		
	Budget and Finance	2002
	Organizational Structure	2005
	Finance	2005
	Information Technology	2005
	Human Resources	2005
	Business Services	2005
Louisville		
	Management Information	2005
	Staffing study	2009
Memphis		
	Information Technology	2007
Miami-Dade County		
	Construction Management	2003
	Food Services	2009
	Transportation	2009
	Maintenance & Operations	2009
	Capital Projects	2009
	Information Technology	2013
Milwaukee		
	Research and Testing	1999
	Safety and Security	2000
	School Board Support	1999
	Curriculum and Instruction	2006
	Alternative Education	2007
	Human Resources	2009

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	Human Resources	2013
	Information Technology	2013
Minneapolis		
	Curriculum and Instruction	2004
	Finance	2004
	Federal Programs	2004
Nashville		
	Food Service	2010
Newark		
	Curriculum and Instruction	2007
	Food Service	2008
New Orleans		
	Personnel	2001
	Transportation	2002
	Information Technology	2003
	Hurricane Damage Assessment	2005
	Curriculum and Instruction	2006
New York City		
	Special Education	2008
Norfolk		
	Testing and Assessment	2003
	Curriculum and Instruction	2012
Orange County		
	Information Technology	2010
Philadelphia		
	Curriculum and Instruction	2003
	Federal Programs	2003
	Food Service	2003
	Facilities	2003
	Transportation	2003
	Human Resources	2004
	Budget	2008
	Human Resource	2009
	Special Education	2009
	Transportation	2014
Pittsburgh		
	Curriculum and Instruction	2005
	Technology	2006
	Finance	2006
	Special Education	2009
Portland		
	Finance and Budget	2010
	Procurement	2010
	Operations	2010
Prince George's County		
	Transportation	2012
Providence		
	Business Operations	2001

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	MIS and Technology	2001
	Personnel	2001
	Human Resources	2007
	Special Education	2011
	Bilingual Education	2011
Reno		
	Facilities Management	2013
	Food Services	2013
	Purchasing	2013
	School Police	2013
	Transportation	2013
	Information Technology	2013
Richmond		
	Transportation	2003
	Curriculum and Instruction	2003
	Federal Programs	2003
	Special Education	2003
Rochester		
	Finance and Technology	2003
	Transportation	2004
	Food Services	2004
	Special Education	2008
San Diego		
	Finance	2006
	Food Service	2006
	Transportation	2007
	Procurement	2007
San Francisco		
	Technology	2001
St. Louis		
	Special Education	2003
	Curriculum and Instruction	2004
	Federal Programs	2004
	Textbook Procurement	2004
	Human Resources	2005
St. Paul		
	Special Education	2011
	Transportation	2011
Seattle		
	Human Resources	2008
	Budget and Finance	2008
	Information Technology	2008
	Bilingual Education	2008
	Transportation	2008
	Capital Projects	2008
	Maintenance and Operations	2008
	Procurement	2008
	Food Services	2008

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	Capital Projects	2013
Toledo		
	Curriculum and Instruction	2005
Washington, D.C.		
	Finance and Procurement	1998
	Personnel	1998
	Communications	1998
	Transportation	1998
	Facilities Management	1998
	Special Education	1998
	Legal and General Counsel	1998
	MIS and Technology	1998
	Curriculum and Instruction	2003
	Budget and Finance	2005
	Transportation	2005
	Curriculum and Instruction	2007
	Common Core Standards	2011
Wichita		
	Transportation	2009