

Business Operations  
J.E. Surash, P.E., Chief Business Officer

**SUBJECT:           PRELIMINARY ACTION PLAN TO IMPLEMENT FMI  
RECOMMENDATIONS TO IMPROVE FACILITIES  
CONSTRUCTION DEPARTMENT**

**COMMITTEE:       FACILITIES MANAGEMENT**

On November 3, 2003 the School Board held a workshop to hear a presentation from FMI on its assessment of the Facilities Construction Department (FCD). At that time, FMI presented its findings, conclusions and recommendations in great detail, and fielded a number of questions from School Board members, including possible options and timelines for implementation of the FMI recommendations. As part of that discussion, District staff indicated it would prepare for the Board's consideration at the November 19, 2003 meeting, a preliminary roll-out implementation plan. The plan proposes to fully implement FMI's recommendations and includes other complimentary actions. For consistency and ease of reference by the Board, the proposed roll-out plan contained in Exhibit 1 retains the numbering sequence of the FMI report, in each of the four major areas described in pages 11 through 22: Program Planning; Program Execution; Program Performance; and Technology Considerations.

It is staff's recommendation that the School Board provide input on the preliminary plan and authorize staff to implement it, with the understanding that additional recommendations will be presented to the Board in subsequent meetings as manpower and other resource issues become better defined. FMI estimates that full implementation of all the recommendations contained therein would translate into potential cost savings of \$18.3M to \$26.3M over a three-year period, and implementation costs of \$710K to \$910K over the same time period.

- RECOMMENDED:**       That The School Board of Miami-Dade County, Florida:
- a.     provide input to staff on the preliminary roll-out implementation plan for the FMI recommendations, as contained in Exhibit 1;
  - b.     authorize the Superintendent of Schools to implement the plan; and
  - c.     direct the Superintendent of Schools to provide quarterly status reports to the School Board starting in January 2004.

JES:ARC:aj

**EXHIBIT 1**  
**FMI RECOMMENDATIONS**  
**PRELIMINARY ROLL-OUT IMPLEMENTATION PLAN**

MAJOR AREA	LEVEL	FMI RECOMMENDATION	TASKS	TIMELINES (COMPLETE BY)	RESPONSIBLE ENTITY(IES)	COMMENTS
PP	C	1.1 COMPLETE INCLUSIVE STRATEGIC PLANNING PROCESS FOR 5-YR PLAN	1.1.1 IDENTIFY/FORM CORE EXECUTIVE TEAM	NOV '03	JES/ARC	
			1.1.2 COMPLETE 2-3 FACILITATED PLANNING SESSIONS (OVER NEXT 60 DAYS)	MAR '04	EXEC. TEAM	
			1.1.3 CREATE PLANNING DOCUMENT WITH VISION, MISSION, VALUES, OBJECTIVES	MAR '04	EXEC. TEAM	
			1.1.4 ESTABLISH ORG. STRUCTURE TO SUPPORT STRATEGY	JUL '04	EXEC. TEAM	
		1.2 ESTABLISH TRANSITION TEAM	1.2.1 SELECT TEAM MEMBERS	JAN '04	EXEC. TEAM	
			1.2.2 AUGMENT TEAM W/ OTHER DEPTS.	JAN '04	EXEC. TEAM	
		1.3 CONDUCT STRATEGY IMPLEMENTATION AND TACTIC DEVELOPMENT WORKSHOP WITH TRANSITION TEAM	1.3.1 FCD MEETING ON ROLLOUT OF EXEC. TEAM PLANNING DOCUMENT	APR '04	TRANSITION TEAM	
			1.3.2 ESTABLISH LEADERSHIP TEAMS FOR EACH FUNCTIONAL AREA	APR '04	TRANSITION TEAM	
			1.3.3 COMPLETE PLANNING SESSION	MAY '04	TRANSITION TEAM	

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PP	IMM	1.4 DEVELOP SEP. '03 5-YR PLAN INTO STRATEGIC PLAN	1.4.1 ROLLOUT DELIVERY PLAN WITH MILESTONES, CASH FLOW AND RESOURCE PROJECTIONS	DEC '03	EXEC. TEAM	
		1.5 ESTABLISH STANDARD SUMMARY REPORT W/ PROJECT/ PROGRAM PERFORMANCE FOR DISTRIBUTION (BOARD AND PUBLIC)	1.5.2 TIER 1-HOMEGROWN DATABASE TIER 2- WEB ENABLED COMPASS TIER 3-OFF THE SHELF SOFTWARE	FEB '04 DEC '03 FEB '04 AUG '04	EXEC. TEAM EXEC. TEAM TRANSITION TEAM	MS ACCESS RFP
		1.6 REVIEW FUNCTIONS OF INT/EXT COMMITTEES AND RECOMMEND CONSOLIDATION/ELIMINATION	1.6.1 IDENTIFY OVERLAP 1.6.2 COMPARE V. STATUTES/BOARD RULES 1.6.3 RECOMMEND RULE CHANGES IF ANY	DEC '03 JAN '04 APR '04	EXEC. TEAM EXEC. TEAM EXEC. TEAM	
		1.7 ESTABLISH ETHICS POLICY AND INTEGRATE WITH TRAINING AND PERFORMANCE REVIEWS -0 TOLERANCE	1.7.1 IDENTIFY PROBLEM AREAS 1.7.2 CONSULT W/ HR AND ESTABLISH POLICY	DEC '03 MAR '04	EXEC. TEAM EXEC. TEAM	

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PP	IMP	1.8 CREATE PEER GROUP TASK FORCE TO ELICIT INDUSTRY INPUT FROM A/E AND CONTRACTORS	1.8.2 IDENTIFY PARTICIPANTS	DEC '03	EXEC. TEAM		
			1.8.3 DEFINE TOPICS	FEB '04	TASK FORCE		
			1.8.4 ESTABLISH CALENDAR	FEB '04	TASK FORCE		
			1.8.5 DEFINE MECHANISM FOR REVIEWING/ADOPTING RECOMMENDATIONS	MAR '04	TASK FORCE		
			1.8.6 REVIEW EFFECTIVENESS OF TASK FORCE	SEP '04	TRANSITION TEAM		
			1.9 IDENTIFY BEST PRACTICES IN OTHER DISTRICTS (COST SAVINGS)	1.9.1 DEVELOP CONTACT DATABASE	FEB '04	TASK FORCE	
			1.9.2 ESTABLISH CONTACTS AND FORMALIZE COMMUNICATION PROCESS	MAR '04	TASK FORCE		
		1.9.3 IDENTIFY BEST PRACTICES		TASK FORCE	ON-GOING		
		1.9.4 EVALUATE/RECOMMEND COST SAVINGS		TASK FORCE	ON-GOING		
		1.9.6 PROVIDE SEMI-ANNUAL REPORTING		TASK FORCE	ON-GOING		
		1.9.7 EVALUATE VALUE OF TASK FORCE		EXEC. TEAM	YEARLY		

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PP	IMP	1.10 CONDUCT FREQUENT STANDING MEETINGS TO DISSEMINATE INFO. AND ACHIEVE COORDINATION AND KEEP MINUTES FOR REFERENCE	1.10.1 DEFINE ORG. TIERS FOR MEETINGS	DEC '03	EXEC. TEAM		
			1.10.2 ASSIGN COORDINATOR @ EACH TIER	JAN '04	EXEC. TEAM		
			1.10.3 ISSUE STANDING MEETING CALENDAR	JAN '04	COORDINATORS		
			1.10.4 ESTABLISH MECHANISM FOR UP/DOWN FLOW OF COMMUNICATION	JAN '04	COORDINATORS		
			1.10.5 REVIEW EFFECTIVENESS AND ADJUST AS NEEDED	JUL '04	EXEC. TEAM		
			1.11 DEVELOP PROGRAM WIDE CRITERIA TO PRIORITIZE PROJECT FUNDING/SEQUENCE				
			1.11.1 ESTABLISH PLANNING CYCLE	DEC '03	EXEC. TEAM		
			1.11.2 CREATE METHODOLOGY FOR PROJECT IDENTIFICATION AND PRIORITIZATION	DEC '03	EXEC. TEAM		
			1.11.3 PRESENT TO BOARD FOR RATIFICATION	JAN '04	EXEC. TEAM		
			5-YR PLAN TO BOARD FOR APPROVAL	JUN '04	EXEC. TEAM		
PP	IMP	1.12 PROVIDE EXTERNAL VALIDATION OF FACILITIES PLANNING & STDS OUTPUT	1.12.1 OUTSOURCE VALIDATION	JUL '04			

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PP	IMP	1.13 ALIGN FACILITIES PLANNING & STDS WITH OUTREACH TO COMMUNITY		SEP '04		
		1.14 PROVIDE EXTERNAL VALIDATION OF DEMOGRAPHIC DATA		MAY '04		
		1.15 CONDUCT INTRADEPT. TRAINING WORKSHOPS TO REINFORCE FCD OWNERSHIP OF MISSION AND INTEGRATION ACROSS DISCIPLINES	1.15.1 IDENTIFY CORE GROUPS 1.15.2 CENTRALIZE TRAINING FUNCTIONS 1.15.3 DEVELOP TRAINING CALENDAR	JUL '04 JUL '04 AUG '04	TRANSITION TEAM TRANSITION TEAM TRANSITION TEAM	DEVELOP SCOPE OF WORK FOR FMI TO PROVIDE CONTINUING TECHNICAL AND MANAGEMENT SUPPORT, COORDINATE TRAINING AND CONDUCT PERIODIC ASSESSMENTS
		1.16 ESTABLISH PRECONSTRUCTION FUNCTION TO VALIDATE SCOPE, COST AND SCHEDULE	1.16.2 IDENTIFY PERSONNEL AND CONSTITUTE UNIT 1.16.3 ESTABLISH VALIDATION PROCESS	DEC '03 JAN '04	EXEC. TEAM EXEC. TEAM	
		1.17 RETAIN LEASES/LEASE MANAGEMENT WITH LAND ACQUISITION				PRESENTLY IN PLACE

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PP	IMP	1.18 ESTABLISH DISTRICTWIDE ADMINIS. AND SUPPORT SPACE REQUIREMENTS	1.18.1 IDENTIFY SPACE REQUIREMENTS	JUL '04	SITE ACQUISITION	
			1.18.2 INVENTORY AVAILABLE SPACE	JUL '04		
1.18.3 VALIDATE	AUG '04					
1.18.4 IDENTIFY POTENTIAL COSTS/SAVINGS	SEP '04					
1.18.6 SUBMIT REPORT TO BOARD FOR APPROVAL	DEC '04					
1.19 INCORPORATE GREATER USE OF PROTOTYPE DESIGNS AND INCREASE STANDARDIZATION FOR CONSISTENCY	1.1.9.1 ACCELERATE KIT OF TOOLS AND MODULAR DESIGNS		DEC '04			

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PE INT/EXT RES.	C	2.1 IMPLEMENT ORG. CHART AND LONG-TERM STAFFING LEVELS IN APPENDIX VIII OF FMI ASSESSMENT (SEE ALSO 2.5)	2.1.1 ANALYZE CHART V. FUNCTIONS	DEC '03	EXEC. TEAM	DEVELOP SCOPE OF WORK AND ADVERTISE RFQ FOR INTERIM FCD "TO BE" POSITIONS		
			2.1.2 FORMULATE STAFFING POSITION	JAN '04	TRANSITION TEAM			
			2.1.3 IDENTIFY STAFF REDUCTION AREAS	MAR '04	TRANSITION TEAM			
			2.1.4 ENGAGE HR AND UNION	JAN '04	TRANSITION TEAM			
			2.1.5 SUBMIT RECOMMENDED PLAN TO BOARD	JUN '04	TRANSITION TEAM			
			2.2 REDUCE POSITIONS ABATED TO CAPITAL BUDGET					
			2.2.1 PERFORM DESK AUDIT OF ABATED POSITIONS	JUN '04	OUTSOURCE			
			2.2.2 IDENTIFY REDUCTIONS BASED ON ACTUAL FUNCTION	JUN '04	OUTSOURCE			
			2.2.3 DEVELOP A TRANSITION PLAN	JUN '04	EXEC. TEAM			
			2.2.4 5-YR PHASE I IMPLEMENTATION	JUL '04 TO JUL '06	EXEC. TEAM			



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PE	C	2.3 DEVELOP GUIDELINES FOR FUTURE ASSIGNMENT AND MANAGEMENT OF ABATED POSITIONS AND DOCUMENT PRESENT AND FUTURE ASSIGNMENTS ON ORG. CHARTS	2.3.1 IDENTIFY NEEDED POSITIONS, FUNCTION AND ASSIGNMENT	JAN '04	EXEC. TEAM/ OUTSOURCE	
			2.3.2 INTEGRATE IN THE FCD ORGANIZATIONAL CHART	JUL '04	EXEC. TEAM	
		2.4 IMPLEMENT SHORT-TERM ORG. STRUCTURE TO FLATTEN FCD AND SEGREGATE ACCEPTED FROM FUTURE PROJECTS	2.4.1 CREATE ACCEPTED PROJECTS TASK FORCE AND KEEP FOR 2 YRS	DEC '03	EXEC. TEAM	
			2.4.2 ESTABLISH SEPARATE SET OF RESPONSIBILITIES AND PAY FOR THIS PERSONNEL	MAR '04	EXEC. TEAM/HR	WILL REQUIRE UNION PARTICIPATION
			2.4.3 COMPLETE CLOSEOUT AND DIS-ESTABLISH THE TASK FORCE	DEC '05	TRANSITION TEAM	

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PE	C	2.5 IMPLEMENT LONG-TERM ORG. STRUCTURE TO FLATTEN FCD	2.5.1 COMPLETE SKILLS INVENTORY	JAN '04	EXEC. TEAM/HR	SUPPLEMENT W/ OUTSOURCING
			2.5.2 PERFORM GAP ANALYSIS OF SKILLS	MAR '04	EXEC. TEAM/HR	SUPPLEMENT W/ OUTSOURCING
			2.5.3 REWRITE JOB DESCRIPTIONS	MAY '04	EXEC. TEAM/HR	SUPPLEMENT W/ OUTSOURCING
		2.5.6 PERFORM OBJECTIVE ASSESSMENTS OF FCD STAFF	JUL '04	EXEC. TEAM/HR	SUPPLEMENT W/ OUTSOURCING	
		2.6 REDEFINE PM ROLE TO INCLUDE RESPONSIBILITY FOR COST, SCHEDULE AND QUALITY		MAR '04		
		2.7 ESTABLISH ACCOUNTABILITY AMONG PM RANKS BY ROLLING UP PROJECT STATUS INTO MASTER LIST BY PM AND PROJECT TYPE	2.7.1 REVIEW/ADJUST WORKLOAD BY PM	DEC '03	EXEC. TEAM	
			2.7.2 ESTABLISH BENCHMARKS	JAN '04	EXEC. TEAM	
			2.7.3 AUTOMATE PROJECT STATUS AND PRODUCE UPDATES FOR MONTHLY MEETINGS WITH SENIOR PMs AND CONSTRUCTION CHIEF			
			TIER 1-HOMEGROWN DATABASE	DEC '03	EXEC. TEAM	MS ACCESS DATABASE
			TIER 2-WEB ENABLED COMPASS	FEB '04		
			TIER 3-OFF THE SHELF SOFTWARE	AUG '04	TRANSITION TEAM	

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PE	C	2.8 PERFORM EXPANDED COMPENSATION STUDY AND ADJUST RECRUITING, PROMOTION AND COMPENSATION	2.8.1 SURVEY SIMILAR DISTRICTS/COUNCIL OF GREAT CITY SCHOOLS	MAR '04	HR	HR AND UNION MUST BE INVOLVED
			2.8.2 PREPARE COMPARISON REPORT AND RECOMMENDATIONS FOR ADJUSTMENT	APR '04	HR	
			2.8.3 SUBMIT TO THE BOARD FOR APPROVAL	JUL '04	HR	
		2.9 AND 2.10 DETERMINE A/E/C SPEND BY CATEGORY AND MOST APPROPRIATE SOURCING STRATEGY GIVEN OVERALL PROGRAM CHARACTERISTICS		FEB '04	TRANSITION TEAM	TO BE CONSIDERED V. DELIVERY METHOD PROTOCOL ADOPTED IN RESPONSE TO OVERSIGHT BOARD
		2.11 STRENGTHEN INTERNAL PM PROCESS FOR DESIGN/BUILD TO ENHANCE PROJECT PERFORMANCE AND PROVIDER EXPERIENCE, STREAMLINE PRE-QUALIFICATION PROCESS AND MAKE IT A YEARLY EVENT	2.11.1 REVISIT INPUT FROM A/E/C COMMUNITY ON DESIGN/BUILD	DEC '03	EXEC. TEAM	NEEDS BOARD ACTION
		2.11.2 ADOPT BEST V. LOWEST RESPONSIVE BID TO ACHIEVE BETTER QUALITY	MAR '04	EXEC. TEAM		
		2.11.3 ADOPT YEARLY PRE-QUAL. PROCESS	JAN '04	DISTRICT BCC		

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PE	C	2.12 INCLUDE PERSONNEL IN A/E/C SELECTION AND PRE-QUAL. WITH RIGHT SKILLS SET	2.12.1 ESTABLISH A STANDING POOL FOR A/E/C SELECTION ACTIVITIES BASED ON SKILLS SET AND FUNCTION	DEC '03	EXEC. TEAM	
			2.12.2 ESTABLISH YEARLY CALENDARS FOR A/E/C SELECTION BASED ON DISTRICT WIDE PROGRAM		EXEC. TEAM	
		2.13 BASE A/E/C CONTRACTOR PRE-QUAL. AND SELECTION ON DELIVERY METHOD, TYPE OF CONSTRUCTION, PROJECT SIZE AND FEEDBACK FROM PRIOR PROJECTS	2.13.1 ESTABLISH RIGOROUS A/E/C EVALUATION PROCESS BY PM	DEC '03	EXEC. TEAM	
			2.13.2 FEED EVALUATIONS TO A/E/C SELECTION AND PRE-QUAL. MONTHLY	DEC '03	PM	RECURRING
	2.13.3 GIVE INCREASED WEIGHT TO PERFORMANCE IN THE PRE-QUAL. AND SELECTION PROCESSES	MAR '04	A/E SELECTION AND PRE-QUAL. COMMITTEE	RECURRING		
		2.14 BEGIN TRACKING PROJECT PERFORMANCE METRICS BY A/E/C		MAR '04		INCLUDE ALSO REVIEW OF CONTRACT INSPECTION PROCESS TO ENSURE FULL CONTRACT COMPLIANCE (CODE PLUS QUALITY)

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PE	C	2.15 DEVISE A PLAN TO UTILIZE NEW A/E/C PROVIDERS ON SMALL PROJECTS TO EXPAND SUPPLIER BASE AND EARMARK LESS COMPLEX PROJECTS FOR FIRST-TIME PROVIDERS				
			IMBED IN 2.13 AND 2.14			
PE INT/EXT RES	IMM	2.16 REVIEW, FINALIZE AND DISTRIBUTE PROCEDURES MANUAL TO FCD STAFF FOR USE	2.16.1 COMPLETE DRAFT	MAR '04	EXEC. TEAM	
			2.16.2 ISSUE TO FCD UNITS AND OUTSIDE DEPTS FOR REVIEW AND INPUT	APR '04	EXEC. TEAM	
			2.16.2 FINALIZE AND ISSUE	JUN '04	EXEC. TEAM	
			2.16.3 TIE IN WITH TRAINING	JUL '04	TRANSITION TEAM	
			2.16.4 PROVIDE MECHANISM FOR UPDATES	JUL '04	TRANSITION TEAM	
		2.17 ARTICULATE ROLES/RESPONSIBILITIES		MAR '04		
		2.18 BUILD PM CENTRIC CULTURE FOCUSED ON ACCOUNTABILITY, RESPONSIBILITY AND AUTHORITY		JUL '04		

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PE INT/EXT RES	IMM	2.19 DEVELOP GROWTH MANAGEMENT PLAN FOR FCD EMPLOYEES TO INCLUDE MANDATED AND ELECTIVE TRAINING	SEE 1.15	AUG '04		
		2.20 DEVELOP PERFORMANCE EVALUATION INSTRUMENTS AND PERIODIC EVALUATIONS	2.20.1 REVIEW CURRENT EVALUATION TOOLS AND FREQUENCY 2.20.2 ENGAGE HR IN REVIEW PROCESS AND RECOMMENDATIONS FOR CHANGE	FEB '04  JUL '04	EXEC. TEAM/HR	WILL REQUIRE UNION PARTICIPATION
		2.21 CONSIDER REASSIGNING 2-5 IT STAFF TO FCD TO SERVE DEPT. NEEDS	SEE 2.2	JUL '04		
		2.22 ESTABLISH PR/MEDIA CONTACT FOR FCD WITH DIRECT LINK TO COMMUNICATIONS DEPT. (CD)	2.22.1 DEVELOP JOB SPECS 2.22.2 ADVERTISE FOR POSITION 2.22.3 TAKE TO BOARD/START PROGRAM	JAN '04  MAR '04  JUL '04	EXEC. TEAM/HR  HR  EXEC. TEAM/HR	

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PE INT/EXT RES	IMM	2.23	ON D/B AND CM @ RISK INCORPORATE SUBCONTRACTOR PRE-QUAL. SYSTEM BASED ON PERFORMANCE	SEE 2.13	MAR '04		
		2.24	ESTABLISH LONG-TERM PRICING BULK PROCUREMENT AND NATIONAL PRICING AGREEMENTS FOR BUILDING PRODUCTS AND FF&E MANUFACTURERS	2.24.1 IDENTIFY ITEMS SUITABLE FOR BULK PROCUREMENT	JUL '04	TRANSITION TEAM	
				2.24.2 ENGAGE PROCUREMENT IN RESEARCH	JUL '04	TRANSITION TEAM	
				2.24.3 IDENTIFY BEST PRACTICES IN THIS AREA	DEC '04	TRANSITION TEAM	
			2.24.4 RECOMMEND CHANGES TO ACHIEVE SAVINGS TO BOARD	DEC '04	TRANSITION TEAM		
		2.25	CONTINUE PURSUING TAX EXEMPT STATUS TO RECOVER SALES TAX COST RELATIVE TO MATERIALS/EQUIPMENT PURCHASES	JUL '04		PRESENTLY UNDER CONSIDERATION IN A DIFFERENT VERSION AS PART OF LEG. PACKAGE	
		2.26	ENFORCE WARRANTIES AND PURCHASE EXTENDED WARRANTIES ON HVAC AND ROOFING SYSTEMS				
			2.26.1 EXPLORE COST EFFECTIVENESS	FEB '04	EXEC. TEAM		
			2.26.2 IF COST-EFFECTIVE IMPLEMENT	APR '04	EXEC. TEAM		

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PE INT/EXT RES	IMM	2.27 DEVELOP COMPREHENSIVE TRAINING PROGRAM FOR ENTIRE FCD DEPT.	SEE 1.15			
		2.28 REDEFINE PM ROLE, REWRITE JOB DESCRIPTION AND ASSESS SALARY LEVEL	IMBED IN 2.5 THROUGH 2.8 AND 2.18			
PE PROJECT CONTROL	C	2.29 INITIATE SERIES OF CROSS-DISCIPLINE TEAMS TO SYSTEMATIZE PROJECT MANAGEMENT FROM INITIATION TO CLOSEOUT (INC. CLOSEOUT TEAM)	2.29.1 APPOINT TASK FORCE 2.29.2 DEVELOP PROCESS FLOW 2.29.3 IMPLEMENT (IMBED IN PROCEDURES MANUAL)	DEC '03 JAN '04 FEB '04	EXEC. TEAM TASK FORCE PM	RECURRING
PE PROJECT CONTROL	IMM	2.30 IDENTIFY CRITICAL SUPPORT TEAM TO ADDRESS CURRENT PROJECTS AND VALIDATE BUDGETS, SCOPE AND SCHEDULE	2.30.1 APPOINT SUPPORT TEAM 2.30.2 REVIEW DISTRICTWIDE PROGRAM 2.30.3 IDENTIFY NEEDED ADJUSTMENTS AND AMEND PLAN AS NEEDED	DEC '03 FEB '04 MAR '04	EXEC. TEAM SUPPORT TEAM EXEC. TEAM	



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PPER	C	3.1 CREATE SYSTEMATIZED PROGRAM AND PROJECT LEVEL REPORTING STRUCTURE AROUND KEY INDICATORS TO PROMOTE ACCOUNTABILITY AND PROACTIVELY REPORT TO THE BOARD	3.1.1 ESTABLISH PROGRAM AND PROJECT REPORTING MECHANISM	FEB '04	IT TASK FORCE	TIER ONE
			3.1.2 ASSIGN RESPONSIBILITIES FOR PROGRAM AND PROJECT REPORTING	FEB '04	EXEC. TEAM/ IT TASK FORCE	TIER ONE
			3.1.3 IMPLEMENT A TWO-TIER REPORTING SYSTEM, WITH TIER ONE USING THE CURRENT SYSTEM'S CAPABILITIES AND TIER TWO AN OFF-THE-SHELF SYSTEM	FEB '04 AUG '04	IT TASK FORCE	TIER ONE TIER TWO
			3.1.4 INTEGRATE INSPECTION AND MAINTENANCE FEEDBACK INTO THE REPORTING SYSTEM	FEB '04 AUG '04	IT TASK FORCE	TIER ONE TIER TWO
			3.1.5 ESTABLISH PERFORMANCE REVIEW FACTORS THAT RELATE TO KEY ASPECTS OF PROJECT MANAGEMENT (INCLUDE RETOOLED CHANGE ORDER PROCESS TO INCREASE VISIBILITY AND SPEED; MODIFY CONTRACTS TO REFLECT RETOOLED PROJECT MANAGEMENT AND CONTRACT ADMINISTRATION)		IT TASK FORCE	IMBED IN 2.5 THROUGH 2.8 AND 2.18  (THESE MEASURES WILL ELIMINATE DUPLICATIVE EFFORTS TO TRACK PROJECTS AS WELL AS CENTRALIZE AND STANDARDIZE REPORTING)

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PPER	IMM	3.2 SOLICIT LEGAL/PROCEDURAL DIRECTIVE TO ESTABLISH COSTS TO BE CHARGED TO CAPITAL PROJECTS AND ADJUST BUDGETS AS NEEDED	3.2.1 ISSUE REQUEST FOR DIRECTIVE	DEC '03	EXEC. TEAM	THIS INITIATIVE MAY MAKE AVAILABLE FUNDING FOR ADDTL PROJECTS
			3.2.2 DEVELOP PROCEDURE AND TIMELINE FOR IMPLEMENTATION OF ANY NEW DIRECTIVES	FEB '04	EXEC. TEAM/ FINANCE DEPT	
3.2.3 ADJUST BUDGETS AS NEEDED AND PREPARE 5-YR PLAN AMENDMENTS	APR '04		EXEC. TEAM			
		3.3 ESTABLISH FACILITIES CONTROLLER POSITION IN FCD REPORTING TO FINANCIAL AFFAIRS	3.3.1 DETERMINE AVAILABILITY IN-HOUSE PARTICULARLY AMONG ABATED POSITIONS	DEC '03	EXEC. TEAM	
			3.3.2 IF PERSONNEL UNAVAILABLE IN-HOUSE DEVELOP JOB DESCRIPTION AND ADVERTISE FOR POSITION	FEB '04	HR	
			3.3.4 TAKE HIRE TO BOARD	APR '04	HR	
			3.3.5 START SUPPORT FUNCTION	MAY '04	EXEC. TEAM	

**EXHIBIT 1**  
**FMI RECOMMENDATIONS**  
**PRELIMINARY ROLL-OUT IMPLEMENTATION PLAN**

MAJOR AREA	LEVEL	FMI RECOMMENDATION	TASKS	TIMELINES (COMPLETE BY)	RESPONSIBLE ENTITY(IES)	COMMENTS
PPER	IMM	3.4 ESTABLISH FACILITIES REVENUE FUNCTION WITHIN FCD TO COORDINATE WITH ADVANCED PLANNING PROGRAM AND PROJECT PERFORMANCE	3.4.1 IMBED IN 2.1, 2.4 AND 2.5			
TECH	C	4.1 ESTABLISH LONG-TERM STRATEGY AND RFP FOR TECHNOLOGY SOLUTION	4.1.1 INTEGRATE FCD'S IT SOLUTION WITH DISTRICT'S IT ARCHITECTURE TO ENSURE COMPATIBILITY 4.1.2 COMPLETE HISTORICAL PROJECT DATA COLLECTION AND ANALYSIS 4.1.3 ESTABLISH FUNCTION IN FCD TO MONITOR DATA GATHERING AND REPORT PRODUCTION 4.1.4 DEVELOP LINK BETWEEN MGMT TECHNOLOGY AND ACCOUNTING/AUDITING TECHNOLOGY	DEC '03   DEC '03  AUG '04	EXEC. TEAM/IT  FCD'S IT TEAM  EXEC. TEAM  TRANSITION TEAM AND DISTRICT IT	