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REVISED DRAFT

DeKalb County School District

Operations & Information and Instructional Technology Divisions
Comprehensive Assessment

*Assessment of the current state of the two Divisions
Conducted September 2024 - June 2025*

Final Report Prepared by:

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Section I

Introduction to Project

Introduction to Project

DeKalb County School District (DCSD) is a public school system in metropolitan Atlanta, Georgia. Situated in the fourth-largest county in the state, DCSD is renowned for its cultural diversity and serves approximately 93,000 students, spanning from pre-kindergarten through 12th grade. With 139 schools and centers, it educates the third-largest student population in Georgia. Additionally, DCSD is the second-largest employer in DeKalb County, with approximately 14,000 staff members.

In early 2024, Superintendent Dr. Devon Q. Horton presented a five-year Strategic Plan to District staff and community stakeholders that set an extraordinary course for improved student success and achievement in DeKalb County School District. The Strategic Plan guides the District's work to ensure that every administrator, teacher and staff member is clear about, and aligned with, its core mission and priorities. At its core, the Strategic Plan commits to building and maintaining supportive structures that foster high-quality academic programs and increased achievement results.

Shortly after launching the robust Strategic Plan, the District contracted with the Center for Effective School Operations (CESO) to conduct comprehensive assessments of the District's Operations Division and the Information and Instructional Technology Division. CESO is a full-service advisory and management firm that provides expertise and supplemental support for public sector entities nationwide. Its robust network of established practitioners performs services individually and across the operational areas of Finance, Facilities, Human Resources, Technology, Transportation, Nutrition Services, Leadership and Communications.

CESO was tasked with assessing the current state of two large divisions and providing recommendations to strengthen their alignment with the DeKalb County School District's Strategic Plan, as well as the priorities set by the Superintendent and the DCSD Board of Education. The identified priorities align with the MIRACLES Framework, an evidence-based strategy for enhancing educational quality. This framework empowers District and school administrators to adjust policies, practices, and expectations, ultimately leading to improvements in both academic and operational effectiveness.

Specifically, CESO focused their work for this project on the outcomes laid out in "Goal Area 6" of the Strategic Plan. The category of *Organizational Excellence* includes the following key priorities:

- Provide clean, safe, and efficient school facilities for all students.
- Deliver safe and efficient transportation services to all students.
- Deliver efficient school nutrition services and healthy meals to all students.
- Improve and maintain a secure, accessible, and equitable digital learning environment for all students.
- Ensure excellent financial management of district resources.

Note: CESO's assessment of the Operations and Information and Instructional Technology Divisions was focused on the current state of the organization and functions of specific areas, not on the individuals or their positions within the District.

CESO began its work with DCSD in September 2024 and presented its comprehensive assessment of the two large divisions to District leadership in June 2025.

Blended Divisional Team

After collaborating with DCSD leadership, CESO assembled its team to conduct the Operations Division and Information and Instructional Technology Division assessments. CESO used a blended divisional team approach to conduct its work. Team members have all worked with school districts of various sizes in the areas of Technology, Finance, Facilities, School Nutrition Services, Transportation, and Human Resources (HR). *A list of CESO and DCSD Project Team members can be found in [Exhibit A](#) of the Appendix.*

DCSD's Request for Proposal (RFP No. 24-594 dated 07.16.2024) requested the following:

- Comprehensive review of the *Operations Division* including, but not limited to, the following departments: Planning/E-SPLOST Programming, Facilities, Design and Construction, Transportation, Fleet Services, Business Services, and School Nutrition.
- Comprehensive review of the *Information and Instructional Technology Division* including, but not limited to, the following departments: Information and Innovation, IT Business Operations, Enterprise App & Data Services, Information and Network Security, IT Support Services, Physical Security, and Data Center & Cloud Services.

Although the District's RFP focused on the Operations and Technology Services Divisions, individual department assessments revealed recurring HR-related themes such as staffing shortages and challenges in hiring, retention, and recruitment. Consequently, a [Recruitment & Retention Strategies](#) section has been included as a resource offering relevant HR recommendations. *It is important to understand that this section is not intended as a formal assessment of the HR Department itself.*

Similarly, CESO was not tasked with conducting a comprehensive assessment of the Finance Division. However, CESO conducted an in-depth review encompassing functions related to E-SPLOST (*Education-Special Purpose Local Option Sales Tax*), staffing, policies and practices, budget, and reporting. *The Finance/Operations & E-SPLOST Funding section of this document shares these findings but it is not intended as a formal assessment of the Finance Division.*

Approach to Work

CESO approached the DCSD comprehensive assessment project in three phases. While the phases of the work during the eight-month project overlap, multiple meetings took place with the Superintendent and the Director of Internal Audit and Compliance to clarify expectations and timelines.

1) Project Kickoff and Data Gathering

All CESO assessments begin with a baseline understanding of the system's structure and responsiveness to the District's policy requirements and strategic objectives. To do this, CESO carefully reviewed the District's organizational structure and governance as well as leadership and management processes across District departments.

CESO assembled its team to conduct the Operations Division and Information and Instructional Technology Division assessments. Next, CESO team members met with DCSD leadership to outline their work approach and to ensure that the project was fully defined and understood by all key participants.

Team leaders met in-person or virtually with DCSD leaders. These meetings helped establish strong working relationships between CESO and DCSD-selected teams and to clarify expectations, timelines and personnel involvement.

CESO collaborated with the DCSD administration to collect and examine various sources of information. These included policies, regulations, procedures, organizational and reporting structures, contracts, decision-making frameworks, budgets, strategic and operational plans, facility plans, financial records, and training and professional development resources. This analysis provided a robust preliminary understanding of the system and its performance.

2) Observations and Interviews

Team members visited DCSD to conduct onsite observations and in-person interviews of selected DCSD department staff and other key stakeholders and focus groups. Online interviews were also used for follow up and to gain deeper insight and understanding to complete the assessment.

3) Assessment and Comparison

CESO assessed DeKalb County School District's (DCSD) personnel management, operations, and technology across the two divisions. The project team compiled data from observations and interviews to evaluate effectiveness and efficiency. This assessment considered DCSD's strategic goals and operational context, while also benchmarking against best practices observed in school districts nationally.

In June 2025, CESO concluded its work with a presentation to the Superintendent and members of the DCSD Board of Education, outlining the final summary and recommendations.

Final Report & Recommendations

The [Summary & Key Findings](#) presents a tailored, thorough report from the in-depth assessments of the current state of the Operations and Information and Instructional Technology Divisions. The individual assessments for each of the two Divisions include detailed explanations of the methodology used, current realities, results and key findings, and a comprehensive plan for action within the Division or Department.

CESO's final recommended actions for each Division and Department are categorized and prioritized in the format of: *Do Now, Do Soon, and Do Later*. Final recommendations focus on aligning both divisions with the DCSD Strategic Plan, building organizational capacity, enhancing facility and digital infrastructure, identifying necessary upgrades, and benchmarking against industry standards and best practices.

Revised Draft 6/18/23

Section II

Summary & Key Findings

Summary & Key Findings

Introduction & Scope of Work

The Center for Effective School Operations (CESO) began its work in September 2024 and presented a comprehensive assessment of the current state of the DCSD Operations and Information and Instructional Technology Divisions to District leadership in June 2025.

DCSD's Request for Proposal (*RFP No. 24-594 dated 07.16.2024*) requested the following:

- *Comprehensive review of the Operations Division including, but not limited to, the following departments: Planning/SPLIST Programming, Facilities, Design and Construction, Transportation, Fleet Services, Business Services, and School Nutrition.*
- *Comprehensive review of the Information and Instructional Technology Division including, but not limited to, the following departments: Information and Innovation, IT Business Operations, Enterprise App & Data Services, Information and Network Security, IT Support Services, Physical Security, and Data Center & Cloud Services.*

Final recommendations focus on aligning both divisions with the DCSD Strategic Plan, building organizational capacity, enhancing facility and digital infrastructure, identifying necessary upgrades, and benchmarking against industry standards and best practices.

CESO discovered that DCSD staff are enthusiastic about the District's direction under the Superintendent's leadership and are focused on student success. They are open to change and see it as a chance to have a positive impact, and expressed a willingness to maintain the District's positive momentum. Staff members were open to sharing their opinions on both the District's successes and its challenges. Overall, during the eight-month assessment period, the CESO Project Team experienced positive engagement with District leaders and staff across all levels of the organization.

Despite this welcoming reception, recurring challenges emerged for CESO staff as they commenced their collaboration with DCSD in the areas of communication, proactive planning, and consistent follow-through. While details in this report address these challenges in terms of internal operations, the challenges experienced by CESO suggest similar challenges in these areas related to the District's engagement with external entities. Improvements throughout and across divisions in communication, proactive planning, and consistent follow-through would benefit all divisions and departments within the District. These three key areas are not only crucial for fostering better alignment between various divisions but also play a significant role in optimizing operational efficiency across the organization. Addressing these interconnected areas presents a significant opportunity for DCSD to enhance its internal operations and achieve greater organizational effectiveness.

Operations Division

Areas of Excellence & Areas for Improvement

The assessments identified multiple areas of strengths for individual departments in the Operations Division. This extensive work also identified areas that need further focus and enhancement. These *Areas of Excellence* and *Areas for Improvement* are summarized below. More details can be found in each individual department's assessment found in this report.

Finance/Operations & E-SPLOST Funding

Areas of Excellence:

- Strong community support for E-SPLOST funding.
- The strong collaboration between Finance and Operations has improved E-SPLOST fund monitoring.
- Key improvements include faster vendor payments, monthly account reconciliation, and consistent communication.
- Budgeting, procurement, and vendor services systems are functioning well, supported by ongoing staff training.
- The Annual Budget Report enhances transparency and alignment with the Strategic Plan.

Areas for Improvement:

- Current quote and approval requirements cause procurement delays, which slow down small repairs and lead to higher costs and additional maintenance challenges.
- MUNIS approval system requires quicker updates when staff changes occur to avoid delays in purchase orders and payments.
- Vendor payment timeliness is improving, but consistent adherence to the 30-day payment goal is needed.
- The District audit must be completed by December 31st to meet State requirements and to support better planning.
- The Finance team should be involved in all E-SPLOST and construction contingency decisions.
- The District does not engage in any long-range financial planning aside from a five-year facility plan, which is a requirement for E-SPLOST.

Department of Facilities

Areas of Excellence:

- Custodial operations now benefit from standardized training, uniform cleaning protocols, and coordinated scheduling.
- Invoice payments are significantly improved, with a goal of processing all within 30 days.
- A new construction management firm provides centralized accountability for projects.
- The District has responded proactively to E-SPLOST audit findings.
- Positive staff morale is attributed to teambuilding and new hires.
- Partnership with *Grainger* improves custodial supply efficiency.
- Annual approval of the Capital Improvement Plan (CIP) list will allow for more agile planning.

Areas for Improvement:

- Current procurement approval levels should be changed as follows: DCSD Chiefs can approve up to \$50,000, the Superintendent can approve up to \$250,000, and anything exceeding \$250,000 will require Board approval.
- The E-SPLOST Advisory Committee should be disbanded due to redundancy and low participation.
- Hiring practices need improvement to address staff shortages and support retention.
- Program Procedures Manual (PPM) should be updated to reflect current project execution standards.
- The existing warehouse is outdated; consider multiple sites with a shared inventory system.
- A vehicle replacement plan is needed for aging fleet vehicles.
- Warehouse Management System (WMS) is inefficient and overly reliant on software developers. It needs replacement or a major upgrade.
- The current purchase order process for recurring purchases involves excessive approval layers and needs simplification.
- The contract approval process is too long, sometimes taking up to three months from RFP to project start.

Department of School Nutrition Services

Areas of Excellence:

- Staff demonstrate genuine care for students and maintain positive interactions.
- Effective collaboration between school staff and administration.
- High emphasis on food safety, sanitation, and student satisfaction.
- Leadership focuses on creating an innovative and essential food program.

Areas for Improvement:

- A comprehensive equipment inventory and replacement plan needs to be developed.
- School Nutrition and Facilities should collaborate on prioritization and maintenance protocols.
- Integrating alarm systems into equipment management will improve adherence to health and safety standards.
- The current organizational leadership structure within the Department is insufficient to adequately support the extensive number of school sites, staff, programs, and school communities.
- Hiring practices need improvement to address staff shortages and support retention.
- Priority must be given to initiatives that will enhance the Department's finances.
- The School Nutrition Services Department lacks a strong brand identity.

Department of Transportation & Fleet Services

Areas of Excellence:

- Safely transports 61,721 students daily despite staffing and resource challenges.
- Transitioning toward sustainable transportation with planned addition of 50 new electric buses to the fleet.

Areas for Improvement:

- The current vehicle fleet was accumulated through ad hoc purchases, not a planned replacement strategy. Implementing five- and ten-year fleet plans would improve efficiency.
- Hiring practices need improvement to address staff shortages and support retention.
- *RTA Fleet Management* software should be fully implemented and integrated into all aspects of the fleet management organization.
- Current routing software presents three primary areas needing improvement:
 - *Edulog* routing software and its map have not been updated in over 15 years.
 - Manual data entry is inefficient and prone to human error.
 - An outdated geographic map is being used for routing purposes.
- The range of school bell times creates logistical issues for transportation, particularly when scheduling morning and afternoon routes.
- Staffing and organizational structure has two key areas for improvement:
 - The Fleet Services Director lacks the official authority to inform fleet purchasing decisions.
 - Staffing structure and job descriptions lack a formal analyst role.

Information & Instructional Technology Division

Areas of Excellence & Areas for Improvement

The assessments identified multiple areas of strengths for individual departments in the Information & Instructional Technology Division. This extensive work also identified areas that need further focus and enhancement. These *Areas of Excellence* and *Areas for Improvement* are summarized below. More details can be found in the detailed Division assessment found in this report.

Areas of Excellence:

- ***Project Management:*** Established processes for intake, prioritization, and implementation; strong alignment with District priorities through collaboration.
- ***Student Information System:*** Skilled management supports implementation, migration, and data integration across learning systems.
- ***Instructional Technology:*** *Ignite* supports professional development with strong backing for teachers and leaders.
- ***Asset Management:*** Effective device lifecycle management; Chromebook loss rates below 5%, outperforming typical 6–12% rates.
- ***Data Center & Cloud Services:*** Proactive cleanup and future-oriented planning.
- ***Physical Security:*** Regular updates on security projects are shared with the School Board.
- ***Call Center/Help Desk:*** Serves as a centralized support hub for all technical issues.
- ***Purchasing:*** Full compliance with purchasing guidelines and policies.

Areas for Improvement:

Technology Planning & Budget:

- Identify all areas for multi-year budgeting to align with current use, as well as planned or potential growth.
- Adding the required network services capacity in older buildings will take additional planning and have significant budget implications.
- Long-term budgeting should account for network switch and wireless access point upgrades on a staggered eight-year timeframe.
- Comprehensive budget planning is needed to foresee funding obstacles to maintaining existing technology programs and incorporating potential new initiatives.

Cybersecurity:

- Develop protocol for labeling and classifying cybersecurity documents. This should reflect the standard practice of Policy, Procedures, Standards, and Guidelines.
- Existing security policies should be reviewed regularly; and that review cycle should be documented within the procedure (e.g. last reviewed/updated).

- Cybersecurity requires sustained attention and support from the District's highest levels of leadership.
- Many expected security practices are already in place but have not yet been formalized into a documented cybersecurity program through security policy, procedure, guideline, and standards documentation.
- Leadership requires clear and concise communication regarding cybersecurity initiatives to make informed decisions.

Data Classification & Data Loss Prevention:

- DCSD is in the early stages of implementing comprehensive Data Loss Prevention (DLP) policies.
- The District must continue to secure the essential tools required to detect and alert the District of potential data leaks.

Opportunities for Ongoing Support

CESO is a full-service advisory and management firm that provides expertise and supplemental support for school districts of all sizes nationwide. Its robust network of established practitioners performs services individually and across the operational areas of Finance, Facilities, Human Resources, Technology, Transportation, Nutrition Services, Leadership, and Communications.

As the District begins to implement the plan of action items outlined in this comprehensive assessment, CESO is equipped to provide additional support in several key areas:

- CESO Nutrition Services has experience in helping school districts with strategic identity and brand planning. CESO can support and partner with DCSD and the Department of School Nutrition Services in the development and planning of a strategic brand.
- CESO's Communications department can help facilitate the development and implementation of a comprehensive internal communications strategy to enhance alignment and collaboration throughout the District.
- CESO Transportation can assist with a technology and data audit of the bus routes. The District intends to implement new routing software, which depends on accurate current data for system updates. However, CESO's assessment indicates that the existing data is unreliable.
- DCSD Fleet Services requires a detailed fleet replacement strategy. CESO Transportation can provide an analysis incorporating 5- and 10-year projections for fleet planning to justify future vehicle acquisitions.

- Although the District recently completed an HR audit, CESO offers a comprehensive HR Operations Assessment that may help address some of the recurring HR-related themes outlined in this comprehensive report, such as staffing shortages and challenges in hiring, retention, and recruitment.
- CESO's HR department could partner with DCSD to conduct a new classification and compensation study focused on developing a classification system that aligns with the District's current and future organizational needs. This study will define and structure job roles to align with the district's priorities, goals, and talent strategy. The framework will promote consistent titles, career paths, and flexible compensation.
- CESO's Finance department can help facilitate the development and implementation of a comprehensive multi-year financial plan for all funds revenue and expenditures resulting in the ability to forecast and plan for potential changes in enrollment, State funding, employee contracts and other costs.
- CESO's Finance department can help facilitate a review of the purchase order process after a suitable period of time utilizing the procurement approval levels recommended in this report.
- CESO's Technology department can assist in the creation and/or review of technology security policies aligned to meet NIST and CIS standards.
- CESO's Technology department can help with comprehensive technology planning, goal setting, and multi-year benchmark alignment.

Section III

Operations Division Assessment

[Finance/Operations & E-SPLOST Funding](#)

[Department of Facilities](#)

[Department of School Nutrition Services](#)

[Department of Transportation & Fleet Services](#)

[Recruitment & Retention Strategies](#)

Finance/Operations & E-SPLOST Funding

Introduction & Scope of Work

The effective financial stewardship of district resources is essential to achieving organizational success. CESO recognizes the critical role of school finances in the success of both the Operations and Technology Services Divisions. Therefore, CESO's scope of work for this project included an in-depth review of E-SPLOST, financial data, processes, and procedures, interviews with key stakeholders, the Strategic Plan, and MIRACLE tenets. *This section shares these findings but it is not intended as a formal audit or comprehensive assessment of the DCSD Finance Division.*

E-SPLOST Funding

E-SPLOST stands for *Education-Special Purpose Local Option Sales Tax*. The E-SPLOST program in Georgia funds capital projects for school systems such as: new facilities, renovations, technology, security, buses, debt reduction, land, equipment, and library materials. We have included detailed information about E-SPLOST in this report due to the significant impact this funding has on multiple DCSD divisions and departments.

- E-SPLOST is a 1-cent sales tax, which the State of Georgia allows counties to collect to fund specific improvement projects.
- E-SPLOST must be approved by voters every five years in a general referendum in order to be enacted and last for a maximum of 72 months (6 years).
- E-SPLOST funds cannot be used for day-to-day operating expenses, such as staff salaries.
- Everyone who shops, dines, or receives services in the school district and county contributes to the fund, including visitors.

Historically, there has been strong community support for E-SPLOST funding. Voters in the District have voted to initiate and continue the E-SPLOST funding program since the late 1990s.

In DeKalb County, an extra one penny sales tax is collected on all purchases. Merchants then report their total sales and sales tax collected to the Georgia Department of Revenue monthly and deposit the collected sales tax. These funds are disbursed by the Georgia Department of Revenue to the DCSD.

DeKalb County School District (DCSD) utilizes the E-SPLOST program to finance District enhancements. Projects supported by E-SPLOST are competitively bid and awarded to the most qualified vendor following approval from the DeKalb County Board of Education. In a referendum

on November 2, 2021, over 80% of DeKalb County voters approved the 2022-2027 E-SPLOST VI, which is projected to generate around \$700 million in sales tax revenue by its conclusion in 2027.

E-SPLOST funds have been allocated to various capital projects, such as constructing new educational facilities, renovating existing schools, upgrading classroom technology, and replacing the school bus fleet.

Approach to Work

Information Gathering & Analysis

A kick-off meeting with Finance and Operations team members was held before the assessment began. During this phase, CESO requested, collected and examined various documents and data, including policies, regulations, procedures, organizational and reporting structures, contracts, budgets, strategic and operational plans, financial documentation, training materials, and decision-making processes. Receiving this data before individual meetings and on-site tours provided the review team with baseline knowledge of DCSD operations and was valuable to the process.

The majority of the requested data had been received as of the date of this report. However, several challenges arose. Due to a major change in the finance management system, historical finance data was received in separate files for each fiscal year, making the review of multi-year financial data for various departments difficult. The audits for the fiscal years ending June 30, 2023, and 2024 were also unavailable at the start of the review; the FY23 audit was not received until March 2025. Additionally, the construction/E-SPLOST Program Procedures Manual (PPM) could not be reviewed, as it is currently being updated by the District's newly hired construction program management firm and DCSD staff.

The project scope encompassed a review of financial processes and procedures related to purchasing, accounts payable, general accounting, budgeting, and communication. The aim was to identify areas of excellence and those that could benefit from improvements in efficiency or effectiveness. *Financial data analysis to determine the District's current or future financial position was not included in the project scope.*

E-SPLOST information was gathered under the areas of Purchasing and Accounts Payable, General Accounting, Reporting and Compliance, Project Management, and Communication. The goal was to review processes and procedures and identify areas of excellence, challenges, and inefficiencies. *E-SPLOST projects were not audited as part of this assessment.*

Observations & Interviews

To gain a complete, accurate, and thorough understanding of the DCSD Finance and Operations departments, CESO assigned experienced consultants and K-12 professionals to conduct onsite

observations and interviews with DCSD staff. This approach expanded and contextualized the initial understanding gained from the data and document review.

After receiving the available data, the CESO assessment team conducted on-site and virtual interviews over a two-month time period from December 2024 through February 2025. The interviews consisted of group sessions to identify overarching themes and individual discussions to gather additional details and perspectives. *A complete list of CESO and DCSD team members who participated in the Finance/Operations and E-SPLOST interviews can be found in [Exhibit C](#) of the Appendix.*

Assessment & Comparison

Primarily, CESO evaluated effectiveness and efficiency against DCSD's unique strategic direction and operational realities by assessing financial management practices, operational practices, and the technical capabilities of each. This was accomplished by analyzing data, information, observations, and interview results. Additionally, a comparison was made to best practices identified through years of work with other school districts and educational agencies.

CESO developed recommended next actions for the District within the Finance and E-SPLOST areas by using responses from group and individual interviews, process documentation provided by DCSD, and in specific areas, by comparing to other school districts. The accuracy and completeness of the results documented in this report depend on the quality of the source data.

We are confident that the results of our review will provide DCSD with valuable insights into the areas of excellence and challenges in the areas of Finance and E-SPLOST. The results of our analysis and supporting documentation are presented in the remainder of this review.

Current Reality

Organization & Staffing

- The Chief Financial Officer and Deputy Chief Financial Officer lead the Division of Finance. Five directors oversee the areas of Budget, Accounting, Vendor Services and Payables, Payroll, and Risk Management. Some staff members have worked in Finance for several years, despite turnover within the department. Finance bookkeepers are located on site at each school and they report to the school Principal rather than the Division of Finance team.
- The Chief Operating Officer and Deputy Chief Operations Officer lead the Division of Operations. The Division also includes a department overseen by the Director of Planning/E-SPLOST Programming, which is responsible for E-SPLOST finance.
- The DCSD Finance Division has multiple positions that collaborate with the E-SPLOST Finance team. These roles include the Manager II Capital Projects Outlay position and five Accounts Payable Clerks. Each of the five Accounts Payable Clerks is aligned with a specific

E-SPLOST finance staff member, and they each manage the same alphabetical range of vendors. Additionally, there are separate procurement teams for construction (capital and E-SPLOST) and non-construction.

- A new construction program management firm, *HPM*, was recently selected by DCSD to manage all capital projects, including E-SPLOST projects. In partnership with the Finance and Operations Departments, *HPM* will oversee vendor selection, execution of contracted services, and construction quality. They will revise and update the Program Procedures Manual (PPM), provide training, and ensure continuous control checks. Internal staff will work alongside the Construction Manager.

Policies & Practice: Vendor Services and Accounts Payable

The Vendor Services and Payables Department is responsible for acquiring and paying for the District's goods and services. This includes vendor management, payment options, invoice management, group discounts, and payment processing and reconciliation. The District has a handbook that outlines processes and procedures for all vendor services, including procurement and purchasing, P-cards, travel, vendor registration, and accounts payable. Staff are offered the opportunity to attend multiple training and update sessions throughout the year.

- DCSD utilizes *MUNIS* for their purchasing process. The online system allows for electronic requisition input from various sites. The approval process for requisitions involves multiple levels, varying based on the specific purchase and department. If an approver is unavailable, a higher-level approver can step in. The District uses blanket purchase orders for recurring purchases and *Equal Level for a Market Place*, allowing staff to compare vendor pricing and make informed purchasing decisions.
- Bid/quote thresholds are defined by [Board Policy DJE: Purchasing](#). Purchases or contracts estimated between \$5,000 and \$99,999.99 require at least two written quotations. Those estimated at \$100,000 or more necessitate a written competitive sealed bid process in accordance with board policy and GA Code § 50-5-67.
- [Board Policy DJE-R\(1\): Purchasing](#) guides DCSD staff P-card use. Purchases are restricted and defined by the Board Policy. P-cards have a \$5,000 daily and \$20,000 monthly limit.
- The timely payment of vendor invoices is contingent upon the site or department marking the product or service as received in the *MUNIS* system. This approval allows the accounts payable team to process the invoice. Similar to requisitions, the approval process for initiating payment varies based on the department. Construction-related invoices require additional approvals from the construction program management firm and District staff to verify work completion.

The Operations Division's Business Services Department has reorganized its staff to coordinate with accounts payable clerks in the Finance Division for vendor assignment and invoice processing. Most invoices for Operations are received at a designated email address to facilitate direct management of the process. This process includes routing invoices to the approving facilities manager for authorization. Once physically approved with a signature on the invoice, the analyst records the items in *MUNIS* on the purchase order.

The Accounts Payable Department issues checks weekly, while employee expense reimbursements are processed electronically via the payroll system.

Policies & Practice: Budget and Reporting

The Budget and Reporting function is managed by the District's finance office. This includes finance systems, account management, audit preparation, and reporting processes. Report completion and the submission process are evaluated by this category, as every district is required to complete and submit reports to demonstrate compliance with state and federal laws.

- The Director of Budget oversees the annual budget process for the majority of General Fund expenditures. The Allotment Department handles staffing budgets, while the Chief of Finance manages revenue budgets.
 - The Budget Team facilitates approximately 50 work sessions over three months to support departmental budget planning.
 - Finance and Operations collaborate monthly to reconcile E-SPLOST accounts, monitor the budget, and project E-SPLOST initiatives.
 - The E-SPLOST team provides revenue and expenditure budgets to the Director of Budget based on revenue collected during a given period.
 - E-SPLOST projects are initially budgeted in broad categories, with certain key projects highlighted. Upon School Board approval, these projects are assigned separate budget line items, enhancing budget precision.
 - Unused E-SPLOST funds at the fiscal year's end are carried over to the next year and remain allocated to the project, whether positive or negative.
 - In the event of a negative balance at the fiscal year's end, the Finance team collaborates with the E-SPLOST team to implement necessary adjustments.
- Historically, the Georgia Department of Audits and Accounts has conducted audits for DCSD. The exception was the FY23 audit, which was conducted by a private firm. Although the Georgia Code GA 36-81-7 requires completion of the audit within 180 days after fiscal year end (December 31st), DCSD has historically completed the audit after this deadline. However, an extension can be applied for.

- Updates on construction projects are provided by DCSD staff and the construction program management firm to the DCSD construction project team, the E-SPLOST Advisory committee, and the Superintendent's Steering Committee.

Finances

DCSD benefits from a robust E-SPLOST program fueled by substantial sales tax revenues within the county. The Operations team budgets for these E-SPLOST sales tax revenues, and the Finance team collects them. These funds are maintained in a separate bank account and require a five-year plan for E-SPLOST funding.

While E-SPLOST II, III, and IV have been reconciled, reconciliation for E-SPLOST V projects is still ongoing. DCSD staff report that E-SPLOST VI tracking is progressing well in the new *MUNIS* finance system. Project overages can be financed through capital funds, interest income from E-SPLOST investments, or Georgia State Financing and Investment Commission (GSFIC) Revenue, which is capital outlay funding from the state made available to school districts for eligible renovations and new construction. The Operations team oversees the management of project contingency funds.

Operational Performance

The strong collaboration between Finance and Operations has improved the process of monitoring this important funding. Budgeting, procurement, and vendor services systems are functioning well, supported by ongoing staff training. Key improvements include faster vendor payments, monthly account reconciliation, and consistent communication.

Use of Technology

The new *MUNIS* system has been well-received by Finance and Operations staff, who are undergoing continuous training to optimize its use. Despite being in the learning phase, staff are finding innovative ways to streamline their workflow. Notable examples include using project codes for E-SPLOST project tracking and implementing Position Control for precise staff budgeting. Additionally, staff leverage *MUNIS*-compatible technology, such as the vendor marketplace, to secure optimal pricing for supplies.

Key Findings

The CESO scope of work for this project included a review of financial data, processes, and procedures, interviews with key stakeholders, the strategic plan, and MIRACLE tenets. Interviews with DCSD staff revealed an overall student focus and excitement about the direction of the District under the Superintendent's leadership. Staff expressed a willingness to maintain a positive trajectory and shared thoughts on successes and challenges. The alignment of current

finance and operations goals with the Strategic Plan is evident, with staff indicating accomplishments in moving the District forward.

DCSD demonstrates several commendable practices that bolster finance and operations within the District, as highlighted below in the *Areas of Excellence*. However, opportunities exist to further enhance the efficiency and effectiveness of the District's finance and operations. These opportunities, outlined in the *Areas for Improvement*, primarily concern process documentation and communication. They are prioritized into *Do Now*, *Do Soon*, and *Do Later* categories in the *Plan for Action* section of this document. The implementation timeline for these areas of improvement will depend on the District's decisions.

Areas of Excellence

- DCSD staff are enthusiastic about the new *MUNIS* ERP (Enterprise Resource Planning) system, which replaced the old *Cross Point* system. Although the transition took several years, it is proceeding smoothly and generating efficiencies in procurement, budget, position control/staffing budget, project management, financial reporting, and other areas. DCSD staff leverage *MUNIS* and partnering technologies to enhance invoicing, procurement, and customer service.
- Both the Finance and Operations departments have a mix of new and existing staff, despite significant turnover throughout the district. Staff members feel positive about the direction and leadership, viewing changes as opportunities for improvement. They also express a growing trust in leadership and emphasize the importance of working together to support curriculum, instruction, and student success.
- The partnership between the Finance and Operations departments has led to critical improvements in E-SPLOST monitoring. These improvements include: aligning positions in each department to expedite vendor payments, monthly reconciliation of E-SPLOST accounts, and consistent communication of E-SPLOST updates.
- The overall feedback for the systems of budgeting, procurement, and vendor services is positive. Staff members regularly attend training sessions to stay up-to-date on processes and procedures. These training sessions include topics like P-card communication, online finance, bookkeeping, and budget updates.
- The District's Annual Budget Report enhances transparency and accountability by demonstrating how actions directly align with the strategic plan.
- The E-SPLOST program has historically received strong community support for funding.
- The Student Assignment Process (SAP) is a recurring and comprehensive planning process that uses extensive data analysis to realign programs, boundaries, and buildings

within the District every five years. This process will help position all DCSD students to *Enroll, Employ, Engage in Entrepreneurship and Enlist* in the military upon graduation.

- Improved oversight and management of all construction projects, including E-SPLOST, will be achieved by transitioning to a new construction program manager who will collaborate with the District.

Areas for Improvement

- The current DCSD policy mandates that two written quotes be obtained for projects costing between \$5,000 and \$99,999.99. Additionally, projects exceeding \$100,000 require board approval, regardless of whether they are capital or non-capital projects. These stipulations regarding written quotes and purchasing approval create delays in completing small repairs and construction improvements. This results in escalated costs and exacerbated maintenance problems. Expediting the approval and completion of minor repairs would facilitate the upkeep of a safe and clean environment for students.
- Finance and Operations staff should collaborate with Technology and Human Resource Departments to ensure prompt updates to the *MUNIS* approval system when staff changes occur. This will maintain timely purchase order and vendor payment approvals, keeping the requisition approval process efficient.
- Although vendor payments are being made in a more timely manner, continued efforts should be made to ensure all vendors are paid within 30 days.
- The audit should be completed by December 31st, in accordance with Georgia Code GA 36-81-7. Although the statute allows for an extension, doing so negatively impacts future planning due to the lack of up-to-date financial records. Additionally, delaying the audit delays the district's ability to take corrective action on any findings.
- To enhance project progression and customer service, the Finance and Operations departments should elevate their communication by scheduling regular full team meetings, despite the challenge of being located in separate buildings. This will ensure both teams have the latest information. The Finance team should be included in all E-SPLOST and construction contingency discussions.
- The new construction program management firm will revise and update the E-SPLOST Program Procedures Manual (PPM). This PPM should include increased involvement from District staff, specifically the Division of Finance. The new PPM should be carefully reviewed to ensure that all changes to the PPM are communicated clearly to both construction and district staff.

- The CESO staff discovered that the District does not engage in any long-range financial planning aside from a five-year facility plan, which is a requirement for E-SPLOST. This was determined through interviews and data requests.
- Overlap of reporting to committees with some similar functions such as the E-SPLOST Advisory Committee and the Steering Committee result in staff reporting to multiple committees and duplicating work.

Plan For Action

Do Now

1. The CESO team examined the competitive selection and procurement approval policies of five districts and suggested the following changes to the existing policies. *Policies from other districts are included in the [Appendix H](#) of this document.*
 - The current DCSD competitive selection process for capital and non-capital projects should be modified to require at least two written quotations for purchases or contracts estimated to cost between \$25,000 and \$99,999.99. A written competitive sealed bid process, as per board policy and state statute, will be required for purchases or contracts with a total estimated cost of \$100,000 or more. DCSD staff will need to plan accordingly to meet the requirements for quotes and bids and, when appropriate, collaborate with the construction program management team to incorporate these requirements into the construction calendar and draw down schedule.
 - The current purchase order system's multiple approval levels, even for small purchases, results in unnecessary delays and inefficient use of the Superintendent's time. This process should be reviewed and streamlined.
 - The current procurement approval levels should be changed as follows: DCSD Chiefs can approve up to \$50,000, the Superintendent can approve up to \$250,000, and anything exceeding \$250,000 will require Board approval. These revised approval levels include the following requirements:
 - The competitive selection policies mentioned above must be followed.
 - The expenditure must be included in the Board-approved budget as per [Board Policy DJ: Expenditure of Funds](#).
 - Additionally, the expenditure is subject to review by the DCSD legal team.
 - After a suitable period following the implementation of updated procurement approval levels, the purchase order process should be reviewed to assess the impact of these new purchasing levels on its overall efficiency.

2. To ensure prompt payment to vendors, improve the process of purchasers receiving invoices in *MUNIS* and approve expenditures/project completion for vendor services. Additionally, DCSD should increase the use of blanket purchase orders for E-SPLOST and capital improvement projects to expedite vendor payments.
3. The District should strive to complete its audit by December 31st, in accordance with Georgia Code GA 36-81-7 and the DCSD MIRACLE Tenet Sound Fiscal Stewardship. Completing the audit by the State Statute deadline would provide staff and the community with more timely historical information and allow the District to respond to any necessary corrections more quickly.

Do Soon

1. The Finance team should have some oversight/involvement with individual site-based Finance bookkeepers.
2. E-SPLOST funding, which is subject to voter approval every five years, is used to partially fund some departments, including Technology. Long-term financial planning should be considered to ensure consistent service, as shifts in voter priorities could impact program continuity.

Do Later

1. Develop a multi-year financial plan that can forecast and accommodate changes in enrollment, State funding, employee contracts, and other costs by tracking all funds revenue and expenditures.
2. Review existing committees to identify any overlaps. Consider phasing out the E-SPLOST Advisory Committee and integrating its responsibilities into the District Steering Committee.

Department of Facilities

Introduction & Background

As part of its comprehensive Operations Division Assessment, CESO engaged with a group of nine Facilities Department staff members through a combination of virtual and in-person meetings. See [Exhibit D](#) in the Appendix for a list of staff who participated in interviews. In addition, CESO conducted site visits to the DCSD warehouse, Dunwoody Elementary, Dunwoody High School, and the District's Operations Building to gain a comprehensive understanding of the Facilities Department's daily functions. *This assessment was focused specifically on operational practices and processes, and did not include an evaluation of the physical facilities themselves.*

Approach to Work

During the initial phase of assessment, CESO collected and reviewed various documents and data pertaining to the Facilities Department. These included policies, regulations, procedures, organizational and reporting structures, contracts, budgets, strategic and operational plans, financial documentation, training materials, and decision-making processes. This data, which was received before individual meetings and on-site tours, gave the review team valuable baseline knowledge of DCSD operations.

To gain a complete, accurate, and thorough understanding of the Facilities Department, CESO conducted onsite observations and interviews with DCSD Team Members and staff. The results and supporting documentation from this comprehensive review process will provide valuable insights into the successes and challenges of the Facilities Department.

Key Findings

Areas of Excellence

- The partnership with DCSD's custodial supply company, *Grainger*, has proven valuable, efficiently leveraging the State contract and *Grainger's* extensive parts inventory. The ability to directly access *Grainger's* vast inventory at the DCSD facility has created a very effective and efficient model.
- The vendor payment process has shown significant improvement over the past two years and is on track to pay all invoices within 30 days. The Director of Business Services reported that the percentage of invoices paid within the net 30 policy increased from 13% in February 2023 to 80% in January 2025.

- The positive direction of the Department is reflected in the upbeat attitude of the staff. This is likely due to the recent teambuilding efforts and newly hired staff within the Department, which have been viewed favorably.
- The process for recurring purchases has been simplified with the expanded use of blanket purchase orders.
- The District has been proactive in its response to the E-SPLOST Audit findings and sees this as an opportunity to improve.
- Construction program management services were recently awarded to *HPM Construction Management* through an RFP process. *HPM* will bring a single point of accountability for E-SPLOST and other funded projects. This is a positive step forward and will result in more consistent reporting and project management.
- Previously, school principals managed individual building custodians. Now, as part of the District's Operations Division, the Custodial Department benefits from standardized training and district-wide, consistent cleaning protocols. Building-use schedules can now be synchronized with custodial staffing to guarantee proper facility upkeep.
- Presenting an annual Capital Improvement Plan (CIP) project list for Board approval, instead of a five-year bundle, enables staff to be more agile in planning and addressing the needs of DCSD's aging buildings.

Areas for Improvement

- The current DCSD policy mandates that two written quotes be obtained for projects costing between \$5,000 and \$99,999.99. Additionally, projects exceeding \$100,000 require Board approval, regardless of whether they are capital or non-capital projects. These current low levels of spending authority for DCSD leaders and the Superintendent slows down payments for small invoices and creates tension with vendors who often charge more due to delayed payment.
- The E-SPLOST Advisory Committee no longer serves a productive role, has become redundant, and it was stated this committee does not follow its own bylaws. The committee also lacks enough members at their meetings to establish a quorum.
- At the time of this assessment, the District reported 129 vacant positions within its Operations Department out of their allotted 340 positions. The high number of open positions makes it challenging to achieve goals due to a lack of staff to handle even basic tasks. The current hiring process has been described by staff as "painful" and needs to be

addressed to fill these critical vacancies as quickly as possible. *A list of vacant Facilities Department positions (dated 11.19.2024) can be found on [Exhibit I](#).*

- The District is missing an independent review of all construction projects which would help ensure that the District is receiving a quality and easy to maintain product.
- The Program Procedures Manual (PPM), which contains the internal standards for the Project Management Team and establishes the processes and procedures for project execution, needs to be updated. The new construction program management firm will revise and update the E-SPLOST PPM which should be carefully reviewed to ensure that all changes to the PPM are communicated clearly to both construction and District staff.
- The current warehouse facility is outdated and inadequate for the needs and size of the District.
- Efficiency can be improved and staff will feel more comfortable working in different locations if products and processes are standardized as much as possible. Standardization also facilitates construction and remodeling projects in areas such as paint colors, lighting, furniture, signage, door hardware, vehicles and building key systems.
- The District's support vehicle fleet has an average age of 10 years, and 64 vehicles are over 20 years old. The Facilities Department uses most of these older vehicles daily.
- The current Standard Operating Procedure (SOP) used in onboarding new employees is outdated and should be updated.
- The Department currently receives low response rates on employee surveys. Additionally, at least one employee expressed concerns about retaliation for providing honest feedback.
- The lack of necessary tools has been cited as a barrier to job performance, and current budget restrictions have necessitated assembling equipment from various sources.
- The current resistance to change within the Department hinders progress and impedes the implementation of new initiatives. This resistance is amplified by the vocal opposition of those who prefer to maintain the status quo, thereby drowning out the voices of those who are open to change and evolution. To facilitate progress, it is imperative to foster improved communication and collaboration surrounding upcoming changes.
- The current Warehouse Management System (WMS) is not user-friendly and requires excessive software developer support, resulting in slow and expensive processes.

- The current purchase order system's multiple approval levels, even for small purchases, results in unnecessary delays and inefficient use of the Superintendent's time.
- Goals created at various levels within the Facilities Department are not aligned with the MIRACLE goals. District office direction and alignment on how to set goals that align to the main MIRACLE goals are needed, as is an overall review of goals and how they are used.
- The contract approval process is currently lengthy and cumbersome, taking up to three months from the initial RFP to project commencement. This is attributed to the large amount of time it takes between Board approvals, contract negotiations, and contract signing, causing unnecessary project delays.

Plan for Action

Do Now

1. The current procurement approval levels should be changed as follows: DCSD Chiefs can approve up to \$50,000, the Superintendent can approve up to \$250,000, and anything exceeding \$250,000 will require Board approval.
2. The E-SPLIST Advisory Committee should be eliminated. It no longer serves a productive role, has become redundant, and lacks enough members at their meetings to establish a quorum.
3. The Department is having difficulty meeting its objectives due to a high number of unfilled positions, especially for Custodians. The [Recruitment & Retention Strategies](#) section of this report includes a list of recommended steps that the District should take to address the issues of staffing shortages and challenges in hiring, retention, and recruitment within the Custodial Department.
4. DCSD should hire an independent third-party commissioning firm to oversee the installation of all energy management equipment and test all energy management points. This firm would report to the construction team and ensure accountability from the installers.
5. The current warehouse management system should be replaced. It is not user-friendly and requires excessive developer support, resulting in slow and costly processes.

Do Soon

1. Review and streamline the current purchase order system.
2. The contract approval process should be reviewed. Currently, it takes up to three months to move a project from the initial RFP to the start date, causing inefficiencies and delays in the project's timeline.

Do Later

1. The PPM needs to be updated to ensure that future projects run by the District follow industry standards and align with the expectations of the newly hired construction program management firm. The new PPM should be carefully reviewed to ensure that all changes to the PPM are communicated clearly to both construction and District staff.
2. It is recommended that the District explore establishing multiple warehouse locations connected by a shared inventory system. The current warehouse facility is old and inadequate for the needs of a large school district.
3. A comprehensive assessment of the current fleet of department vehicles is recommended to determine their age, mileage, condition, maintenance history, and suitability for their assigned tasks. Based on this assessment, a detailed vehicle replacement plan should be developed.
4. Creating an updated SOP manual will improve onboarding of new employees, clarify role expectations, and ensure consistency and efficiency across the district.
5. Employee feedback and data collection methods should be reevaluated due to low response rates on employee surveys.
6. Given budget constraints, it may be beneficial to assess the equipment and resources required to effectively perform job duties. The lack of necessary tools has been cited as a barrier to job performance.

Department of School Nutrition Services

Introduction

To gain a comprehensive understanding of the challenges faced by the School Nutrition Services Department (School Nutrition), CESO employed a multi-faceted approach to gather information. This included interviews with a wide range of staff, from leadership and central office teams to regional supervisors, kitchen staff, and building administrators. *A list of interview participants can be found in [Exhibit E](#) of the Appendix.*

Additionally, CESO observed meal services at multiple school buildings, engaging in informal conversations with students and gathering data through internal requests and public platforms. Key areas of focus included equipment and facilities, staffing, revenue opportunities, efficiency improvements, and the overall student experience, encompassing customer service and food and beverage quality.

Current Reality •

Organization and Staffing

The Department is led by the Executive Director of School Nutrition Services. An Assistant Director supports this work, along with a team of Regional Compliance Supervisors.

- At the time of the assessment, several critical vacancies were identified within the Department. *A list of vacant School Nutrition Services Department positions (dated 11.19.2024) can be found on [Exhibit I](#).*
 - DCSD is divided into seven regions and the Department has a Regional Supervisor assigned to each region. One of the seven Regional Supervisor positions is currently vacant, but the Training Supervisor is stepping in to assist in the region.
 - The School Nutrition Finance Team has four members, but is currently missing their payroll clerk.
 - The Free & Reduced Administrative and Product Purchasing Teams have two vacancies each, leaving them with two and six members, respectively.
 - The Technology Team, which is vital for operational efficiency, has only two of its four positions filled.
 - Supervisors from the School Nutrition district office reported spending significant time completing the duties of vacant positions.

- Previously overseen by the Finance department, School Nutrition now falls under the Operations Division. School Nutrition leadership believes that the support they received from the Finance department was more relevant to their needs than the support they currently receive from the Operations Division.
- The District does not have satellite kitchen sites or any central kitchens. A central warehouse, secured through a bidding process, stores commodity items to support kitchen operations. School Nutrition operates 125 school kitchens, each preparing meals and competitive foods on-site.
- Principals at each school are responsible for the hiring, performance evaluation, and discipline of School Nutrition Managers and Food Service Assistants. While the Department conducts training and follow-up for these employees, it has no role in hiring or evaluating staff performance and must work through the building principal to administer any disciplinary action.

Policies & Practice

- The Department is monitored by several governing bodies. The State and Federal agencies oversee policies and procedures, which are managed by the Department's central office staff. Additionally, the local health department is responsible for monitoring sanitation and safety compliance.

At the time of the assessment, the District's School Nutrition leadership was preparing for an administrative review by the State of Georgia to be completed in Spring of 2025. During the review, officials examine areas such as menu and nutritional compliance, procurement, meal counting and claiming, issuance of educational benefits, and allowable expenditures. The findings from the review will provide leadership with guidance for future improvements.

- District Standard Operating Procedures (SOPs) regarding safety and sanitation are routinely referred to and followed by School Nutrition site level staff. Site managers are diligent at record keeping and logging while receiving, storing, and during meal production, and their collective health department scores are reflective of this.
- SOPs for menus, recipes, production, and presentation are inconsistently followed due to several factors. These factors include limited product availability and individual site manager decisions, leading to a lack of adherence to published menus. Additionally, there is inconsistency in product preparation and presentation across different school sites. For instance, the method of serving fruit varies, with some sites using disposable cups or bags and others using bulk containers with communal serving utensils.

Furthermore, the process for providing alternative menu options differs, with some sites allowing students to self-select and others requiring verbal requests from staff. These discrepancies are attributed to differences in serving area design and equipment, as well as varying building-level norms that have developed due to a lack of strongly emphasized standard operating procedures.

- Communication barriers exist within, and outside of, the School Nutrition Department. Specifically:
 - All communication must be directed through the Executive Director.
 - The Department's webpage lacks direct email links for staff.
 - CESO experienced difficulties arranging data collection and site visits.

Finances

- The School Nutrition Department has a year-end balance that meets the three-month operating budget requirement. However, the current budget lacks sufficient allocation for new equipment or upgrades to serving areas.
 - Of the 124 schools under the Department's purview, 104 operate under the Community Eligibility Provision (CEP), allowing all students to receive meals at no charge.
 - To maximize federal reimbursement under CEP, schools must maintain an Identified Student Percentage (ISP) of 62.5% or higher. Currently, some DCSD schools operate CEP below this threshold. The Department leader did not provide a clear method for determining which schools should operate under CEP.
 - Additionally, potential revenue is lost due to the absence of a la carte options in many schools and low breakfast and lunch participation in some, particularly in northern regions of the District.

Operational Performance

- The Department successfully provides nutritious meals to students, aligning with federal guidelines and promoting academic achievement. However, when compared to other high-performing School Nutrition programs, DCSD's program shows varying degrees of success depending on the specific key area assessed such as: food quality, menu innovation and relevance, student participation and Department financial outcomes.
- There is significant potential for growth within the School Nutrition Department. Enhancing menu options and quality will increase participation, thereby improving the School Nutrition Fund. Expanding non-program sales opportunities will also have a positive effect on the Fund. This improved financial stability would allow for self-funded upgrades to kitchen equipment, functional meal spaces, and the program's overall brand.

Use of Technology

- *PrimeroEdge*, a comprehensive school nutrition software program developed by Cybersoft Technologies, is utilized by the School Nutrition Department to streamline its operations. *PrimeroEdge* is used for various functions, including point of sale, menu planning, nutrient analysis, production records, online menus, site food and paper orders, inventory, and Application for Educational Benefits processing. The District's student information system, *Infinite Campus*, has established imports and exports with *PrimeroEdge* to exchange necessary student information and Application for Educational Benefits status.
- The Department utilizes the District's finance system, *MUNIS*, to enter information for accounts payable.
- Families receive nutritional information and school menus via e-newsletters and website content. Social media is currently not being used to disseminate school nutrition information or to engage stakeholders.

Key Findings

Areas of Excellence

- Customer service is a key component of successful school nutrition programs. DCSD staff excel in this area. Site level observations revealed staff's genuine care and concern for students and their meal experience. Positive and caring interactions with students illustrated staff's commitment to building meaningful relationships. For instance, an elementary student eagerly shared his math test success with the cashier, whose enthusiastic response filled the student with pride. Addressing many students by name, staff exchanged pleasantries, creating a positive and welcoming meal environment.
- School Nutrition staff have built positive relationships with students. Staff has also effectively collaborated with building level staff and administrators. There was evidence of strong communication and support among the various student support stakeholder groups.
- Department leadership and staff prioritize food safety and sanitation, evident in their pride in high health inspection scores. This emphasis was observed during a districtwide manager meeting, where School Nutrition leadership acknowledged and commended schools with exceptionally high scores.
- The Department's Kitchen Managers and staff prioritize student satisfaction; their success is measured by student excitement about meals and time spent in cafeterias. Leaders share a goal to create an innovative food program that is essential to every student's day.

Areas for Improvement

- **Equipment inventory and replacement plan:**
 - The School Nutrition program needs to develop a comprehensive inventory and replacement plan for all equipment. This will allow for proactive planning and budgeting for equipment repairs and replacements by systematically tracking the condition and lifespan of the equipment and outlining a funding source for outdated or non-functional equipment.
 - To avoid disruptions and delays, the School Nutrition and Facilities Departments must work together to establish protocols for prioritizing equipment replacement and maintenance based on both operational needs and equipment condition. This collaboration will ensure timely repairs and replacements and improve interdepartmental communication.
 - The three-year plan presents an opportunity to evaluate dishroom and dish machine use and implement more sustainable practices, including the use of energy-efficient dish machines, thereby aligning the nutrition program with the District's long-term environmental goals. Optimization of dishwashing processes could also reduce water and energy consumption.
 - The sites visited by CESO were using dishrooms for storage and/or prep space, and staff indicated a lack of personnel to operate the dishrooms. Consequently, all dishes were being washed in three-compartment sinks. Additional training is needed to illustrate how dish machines would improve overall efficiency.
 - To further enhance food safety and prevent costly waste due to spoilage, we recommend evaluating and implementing alarm systems for walk-in coolers and freezers. These systems provide real-time alerts if temperatures deviate from safe ranges, allowing for immediate action to be taken. Integrating these alarm systems into existing equipment management protocols would strengthen adherence to health and safety standards.
 - Improvements in equipment inventory management, funding allocation, interdepartmental collaboration, sustainability efforts, and the addition of monitoring systems for refrigeration would greatly enhance the efficiency, safety, and sustainability of the School Nutrition program.

- **Human Resources:** The current organizational leadership structure for the School Nutrition Department does not allow for adequate support for the number of school sites,

staff, programs, and school communities.

- The Executive Director of School Nutrition is inundated with site-level employee issues, leaving little time for program growth initiatives, planning, and strategizing. The Assistant Director of School Nutrition is covering for currently vacant central office roles. With 8 of 30 central office positions vacant, the remaining staff and Department leadership are overburdened.
- We propose restructuring the top-level leadership to include more Director/Assistant Director positions. This would allow for strategic change, growth, and innovation. Additionally, we recommend developing a plan to provide enhanced training for central office staff.
- Low staff morale, likely caused by feeling undervalued, contributes to turnover and hiring challenges. This is reinforced by a lack of public recognition for their work, unlike other departments. Public recognition is crucial for job satisfaction, and District leadership should acknowledge staff contributions.
- **Financial Growth:** School nutrition programs have the potential to be fully self-sufficient, covering all expenses including kitchen equipment repair and replacement. To achieve this, The District's School Nutrition Services Department needs to prioritize initiatives that will enhance its financial situation.
 - *Staffing Models at Building Site:* The industry standard Meals Per Labor Hour (MPLH) calculation, which shows kitchen operation efficiency, can be used to assess nutrition program staffing models. In 2021, a comparison study of similar-sized districts showed the DCSD School Nutrition program with the lowest calculation of 16.1. The study included a plan to increase this MPLH by "right-sizing" the Department. A recent analysis by CESO Nutrition Consultants found the MPLH had increased to 16.3. Considering production and enrollment, the Department's average MPLH should be between 19 and 20, which aligns with recommendations from the Institute of Child Nutrition.
 - *Increase Revenues:* The District should prioritize revenue generation by increasing meal participation and a la carte sales. Additionally, the District must support School Nutrition by eliminating competitive food sales within the District. Department leadership has indicated that a 10% increase in meal participation over three years is a top priority. An assessment of labor costs, kitchen efficiencies, and the development and adherence to standard operating procedures will help meet this goal.

- *Student Participation:* Participation in the meal program varies widely across the District. The average districtwide participation rate for breakfast was 30.6% and 57% for lunch (August 2024 - January 2025). Because the vast majority of students have access to both meal offerings at no charge through the community eligibility provision, there is a significant opportunity for an increase in participation which will greatly increase MPLH and revenue.

A targeted approach to increasing student participation in Regions 1 and 2 of the District should be taken to reveal the core reasons why students are not choosing to eat school meals. At Dunwoody High School, breakfast participation is 7% and lunch participation is 18%. At Lakeside High School, breakfast participation is 6% and lunch participation is 28%. Regardless of the relatively low percentage of students who qualify for educational benefits at these schools, only half of the students who qualify are choosing to eat school lunch.

The School Nutrition Department can increase student participation and surpass the three-year goal of 10% through strategies including: revamping menus with more current and trendy menu offerings, applying more modern servery layout styles in the secondary schools, and initiating re-branding and marketing techniques.

- *A la Carte Items:* Currently, the variety of choices and availability of a la carte items vary based on input from site kitchen managers and building principals. This should be standardized by expanding availability through age-appropriate product selection, systems, and communication with families.
- *Vending Machines & Other Meal Offerings:* The vending machines located in secondary school common areas contain items that violate USDA smart snack regulations. These vending machines should be removed. Students should not have access to meal delivery services and food trucks during the school day.
- ***Branding & Innovation:*** School nutrition services can generate revenue and should, at a minimum, operate without needing general fund support. The Department's success relies on active participation from students and families, making a business-oriented approach crucial. Currently, DCSD's School Nutrition Department lacks a strong brand identity which is a key element of any business. Apart from staff uniforms, there are no distinguishing elements in cafeteria spaces to establish the Department's identity within the school community.
 - Enhance the visual appeal and student experience in cafeterias by adding signage or graphics to highlight offerings. Secondary school serving lines could benefit

from a modernized food court or retail-style approach, offering diverse menus at each station to promote choice and appeal to older students.

- Parents who are unable to be at school every day to see meal offerings rely on virtual methods to stay informed about what their children are eating. Currently, DCSD School Nutrition lacks social media accounts to share information or images of meals. This creates a disconnect between parents and the school's food offerings, causing parents to rely on potentially outdated information from their children or their own school experiences.
- Continue to develop the Department's emerging "culinary culture" characterized by expanded menus catering to the District's diverse community.

Plan for Action

Do Now

1. *Urban School Food Alliance membership* - DCSD was previously a member of The Urban School Food Alliance, a group providing expertise, knowledge, and resources to school nutrition departments. The membership, costing roughly \$20,000 annually, was not renewed due to budget cuts in the School Nutrition Department. As an Urban School Food Alliance member, DCSD could gain valuable insights into regulations, revenue generation strategies, efficiency improvements, and collaborative projects with similar districts nationwide. It is recommended that DCSD rejoin the alliance due to the value it provides.
2. *Nutrition Services Strategic Identity and Brand Planning* - To enhance alignment with the District's Strategic Plan, the District Communications Department or a third-party vendor should be engaged to update the mission, vision, and Department strategic plan. This comprehensive plan should encompass School Nutrition's logo and branding, core food philosophy, and community engagement and social media strategy. Implementing the plan will significantly impact the image and offerings of the District's School Nutrition Services and will guide their program moving forward. This is a substantial task and will require considerable time; therefore, it is recommended to initiate the process now, while acknowledging that the full impact will not be immediate.
3. *Human Resources* - CESO's indepth review of the District's School Nutrition Services Department revealed several themes related to staffing shortages and challenges in hiring, retention and recruitment. The following items are considered actions that DCSD can implement now to address these challenges. For further information, please refer to the [Recruitment & Retention Strategies](#) section of this report.

- a. *Leadership Structure* - Current leadership structure lacks the capacity for program growth. Restructuring to include a Director and two additional Assistant Director positions will provide the time and resources needed to support these efforts.
- b. *Staff pay schedules* - Collaborate with the Finance Department to provide school-year staff the option of a 10-month pay schedule in addition to the current 12-month schedule. For part-time staff, an annualized salary schedule can reduce the perceived value of their paychecks. Staff may need immediate access to their earnings and may seek other employment if annualization is mandatory.
- c. *Frontline Aesop* - The Department should leverage *Aesop* to manage substitutes and daily vacancies. *Aesop* would streamline the process of finding replacements for absent staff, which is currently done manually by site managers and regional supervisors calling substitutes from a phone list. Using *Aesop* would save time and more efficiently notify substitutes of open positions.
- d. *Culture* - To foster a positive and productive environment, the Department should establish clear cultural norms, processes, and expectations that ensure staff members feel seen, heard, and valued. This includes recognizing their work, contributions to the district, and the skills, talents, and ideas they offer. District leadership should regularly and publicly acknowledge the significant contributions that School Nutrition staff make to students' lives at all levels of the school district.
- e. *Candidate Pool Refresh*: Launch recruitment campaigns specifically tailored to the food services sector, with targeted messaging and community outreach to build a sustainable pipeline of interested candidates.
- f. *Retention Strategy Development*: The Department should implement a long-term retention plan that includes professional development, recognition efforts, and career growth pathways for employees.

Do Soon

1. *Building staff hiring and supervision* - To create a smoother and more consistent experience for candidates, the hiring of building managers and staff should be transitioned from building administration to Regional Supervisors. This will ensure that the same department and leadership team are responsible for selecting, training, evaluating, and coaching all candidates.
2. *Right-sizing building staff* - Develop a collaborative plan with human resources to reallocate labor and increase meals per labor hour from 16.3 to 18.0. This plan should include a process for eliminating positions through attrition and reassigning staff to

alternative buildings. Implement the MPLH tracking system through *PrimeroEdge*, the School Nutrition operations software, to monitor progress.

3. *Equipment Replacement Plan* - Conduct a comprehensive inventory of all District equipment. Establish a replacement cycle and estimated replacement date for each type of production equipment, based on the manufacturer's suggested life cycle. At the same time, standardize replacement models for each building level to improve efficiency in training, production, and menu execution.

Do Later

1. *Standard Operating Procedures* - The School Nutrition Department needs to develop updated and comprehensive SOPs to align with its new strategic identity, brand, vision, and direction. These SOPs should encompass all aspects of operations, including food safety, sanitation, production, and presentation. Once finalized, the SOPs should be implemented and all School Nutrition staff should undergo training to ensure understanding and adherence to the new procedures.
2. *Catering Programs* - Develop an internal catering program within the School Nutrition Department that District departments can utilize, fostering collaboration and positive image for School Nutrition services across the district. This initiative will also create an alternative revenue stream, although profitability is secondary to the primary goal of promoting goodwill and internal marketing.
3. *Supper Programs* - Administer surveys and conduct participation studies of parents to determine which schools should implement the supper program. Secondary schools with established after-school programs will likely have higher supper participation rates.

Department of Transportation & Fleet Services

Introduction

The CESO Transportation team met with several key members of the DCSD Transportation & Fleet Services Department. The purpose of these meetings was to collect data, to ask clarifying questions related to the data, and to allow for the stakeholders to provide a summary of their day to day job functions, their observations on operational challenges, and ability to share their perspectives. These meetings included all leadership (Executive Director and Director level), several Lead Mechanics, Mechanic Supervisors, Financial personnel responsible for transportation finances, Transportation Safety Supervisors, and Transportation Routers and Schedulers. The meetings were conducted both remotely as well as onsite. *A list of interview participants can be found in [Exhibit F](#) in the Appendix.*

The DCSD transportation program provides a vital service to families, safely transporting nearly 62,000 students daily. This substantial operation covers tens of thousands of miles and bus stops each day, spanning the entire county and ensuring students have access to education. The District's fleet consists of 1,467 vehicles. A significant portion, 983 vehicles, is dedicated to student transportation, while the remaining 484 vehicles support other District operations, such as facility maintenance.

Current Reality

The Department of Transportation & Fleet Services is part of the DCSD Operations Division and consists of two departments. *Fleet Services* maintains all DCS fleet vehicles, including school buses and support vehicles ranging from personal sedans to pickup trucks and heavy equipment. *Transportation Services* is responsible for hiring, training, managing, and administering all bus routes and daily pupil transportation operations.

Three key factors have brought the two departments to a critical juncture:

- First, there has been insufficient strategic investment in vehicle replacement based on metrics such as age, mileage, or usage duration.
- Second, maintaining adequate staffing levels has been an ongoing challenge.
- Finally, recent turnover in key leadership positions has created an opportunity for a new direction.

Current leadership is motivated to implement improvements and to ensure a sustainable future for all transportation services throughout the District. The analysis and recommendations in this Transportation & Fleet Services Department assessment aim to support these endeavors.

Organization & Staffing

The Transportation and Fleet Services Departments are each overseen by a separate Director. The two Directors report to the Executive Director of Transportation & Fleet Services who reports to the Deputy Chief of Operations. The administrative and office functions for these departments are carried out by staff situated at different locations.

Both the Transportation and Fleet Services Departments are severely understaffed, currently operating at roughly 60% of their necessary personnel levels. This includes a deficit of approximately 100 bus drivers, and over 20 mechanics. *A list of vacant Transportation & Fleet Department positions (dated 11.19.2024) can be found on [Exhibit I](#).*

CESO's discussions with staff consistently revealed that the significant staffing shortage within these Departments has a substantial impact on the overall work environment. This issue was a frequent point of discussion during interviews and meetings. The [Recruitment & Retention Strategies](#) section of this report includes a list of recommended steps that the District should take to address the issues of staffing shortages and challenges in hiring, retention, and recruitment within the Transportation & Fleet Services Department.

Policies & Practices

School Board policies and standard operating procedures guide the work of the two departments. Continuous review and updates to the Standard Operating Manuals are essential to align with changes in policy and procedures.

- ***Transportation Eligibility:*** Georgia mandates that its public school districts provide transportation for regular education students residing beyond 1.5 miles from their assigned schools. However, school boards have the discretion to offer transportation to students living within the 1.5 mile radius with any associated costs borne by the district.

School Board Policy requires that DCSD provides transportation for the following students:

- Elementary school students who live at least 1 mile from their assigned school and within the school's attendance zone.
 - Students who live at least 1.5 miles from their assigned middle or high school and within the school's attendance zone.
 - Students mandated by federal or state law to receive transportation; or
 - Students who are enrolled in a school choice program (per the eligibility standards set forth in the "Transportation Requirements" section of the latest "School Choice Programs Catalog.")
- ***Bus Stop Locations:*** The DCSD School Board has the authority to regulate bus stop locations within the District, per GaDOE (Georgia Department of Education) requirements. Bus stop locations for student transportation are determined using the following criteria:

- Stops are placed on or outside of the walk path: 1.5 mile walk path for middle and high school, 1 mile walk path for elementary schools.
 - Bus Stops are located at intersections.
 - Bus stops are not located in areas where students would be required to cross a road that has a posted speed limit of 45 mph or higher.
 - Stops should not be placed closer than one-tenth of a mile from another stop.
 - Bus stops are placed in an area that does not require a student to cross a multi-lane road.
 - Maximum walk-to-stop distance is a quarter-mile for elementary students and four-tenths of a mile for middle and high school students.
 - Bus stops should not be located in areas that would require students to cross railroad tracks.
- **Routing practices:** The Transportation Department covers 257 square miles using 581 route buses to transport around 61,721 students each day. The buses complete 2,979 individual route segments daily to achieve this.

To manage such a large and complex geographic area, the DCSD transportation system is divided into seven geographic regions. Currently, each of the seven regions contains one high school, one middle school, and several elementary schools. However, the existing seven-region model is based on a seven-region map created for the 2021-2022 school year and does not yet align with the updated 2024-25 Areas and Clusters configuration. View the current 7-Region Map in [Exhibit J](#) of the Appendix.

Each of the current seven regions create and maintain routes independently for their own region. To accomplish this work, each individual region has a routing supervisor, an assistant supervisor, and routing technicians. The Department's Routing Supervisor oversees routing operations for the entire District and assists in the McKinney-Vento staff driver program.

While the regional routing system allows routers to specialize and gain expertise in their assigned areas, it is crucial to ensure that routing teams do not become isolated working within their individual regions. Routing teams must remain adaptable and capable of supporting other regions when workloads exceed capacity. To monitor and identify when staff and resources need to be adjusted between regions, CESO recommends developing key performance indicators.

Staff attrition among District routing operations has made it necessary to consolidate the two special education routing teams into the seven region teams, eliminating the special ed only teams. This consolidation has negatively impacted employee morale and the Department's ability to implement timely changes or additions to programs.

The routing team has been facing challenges meeting transportation deadlines. When the Students of Advance Research program (S.O.A.R.) began offering DCSD transportation services in January 2025. Routers had been required to work over the holidays and during the winter break to help meet scheduling and routing deadlines.

- **Route Characteristics:** The District's bus route data was analyzed by CESO to determine route characteristics and key performance indicators. This information was used to assess the efficiency and effectiveness of the DCSD transportation system. The average route duration is 29.4 minutes in length, and the average route had 40 students assigned to ride. These characteristics suggest that there is additional time available to create longer routes as the time in between Tiers is 45 or 55 minutes depending on the Tier. Additionally, as bus capacities for students seated two-per-bench are approximately 50 students per bus (slight variation across the fleet), an average of 34 students per bus suggests that more students could be assigned to bus routes to better utilize available seating.
- **Three-Tier System Structure:** The District organizes student busing schedules using a 3-Tier system. See Figure A below. The success of a 3-Tiered system depends on the time separation between the tiers and efficient route design. To optimize both capacity and time, each run should be allocated enough time to accommodate the maximum number of students and to complete the run.

The length of the school day and where the schools are placed on the tiers also affect the ability to utilize bus routes fully.

- Schools with the shortest days (6 hours 30 minutes) are on Tier 1.
- Schools with a 7-hour day are on Tier 2.
- This allows an extra 30 minutes between Tiers 1 and 2 and another 5 minutes in Tier 3.
- The additional time built into the 3-tier system allows extra time between tiers for the afternoon runs.

Figure A: DCSD School Time Structure

Tier Level	School Type	A.M. Bell Time	Minutes to Complete Tier	P.M. Bell Time	Minutes to Complete Tier	Length of Day
1	Elem	7:45 AM		2:15 AM	55 mins	6h 30m
2	HS	8:10 AM	25 min	3:10 PM	45 mins	7 h
3	MS	8:50 AM	40 min	3:55 PM		7h 5m

The constraint between Tiers 1 and 2 is most critical in the morning, when there are only 25 minutes of pickup time. To overcome this constraint and to maximize efficiency, buses need to drop off at the Tier 1 schools up to 30 minutes before the morning bell time. The critical constraint can be illustrated in *Figure B* and *Figure C* below.

Figure B - Morning Fleet Deployment - 2024-25 school year

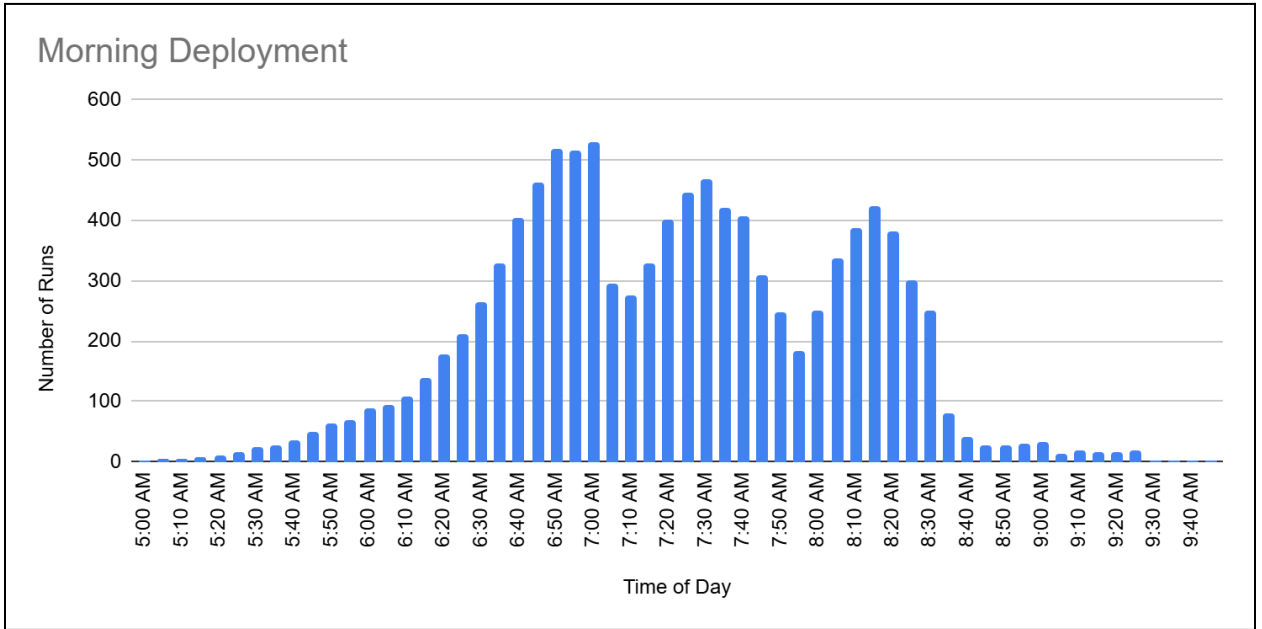
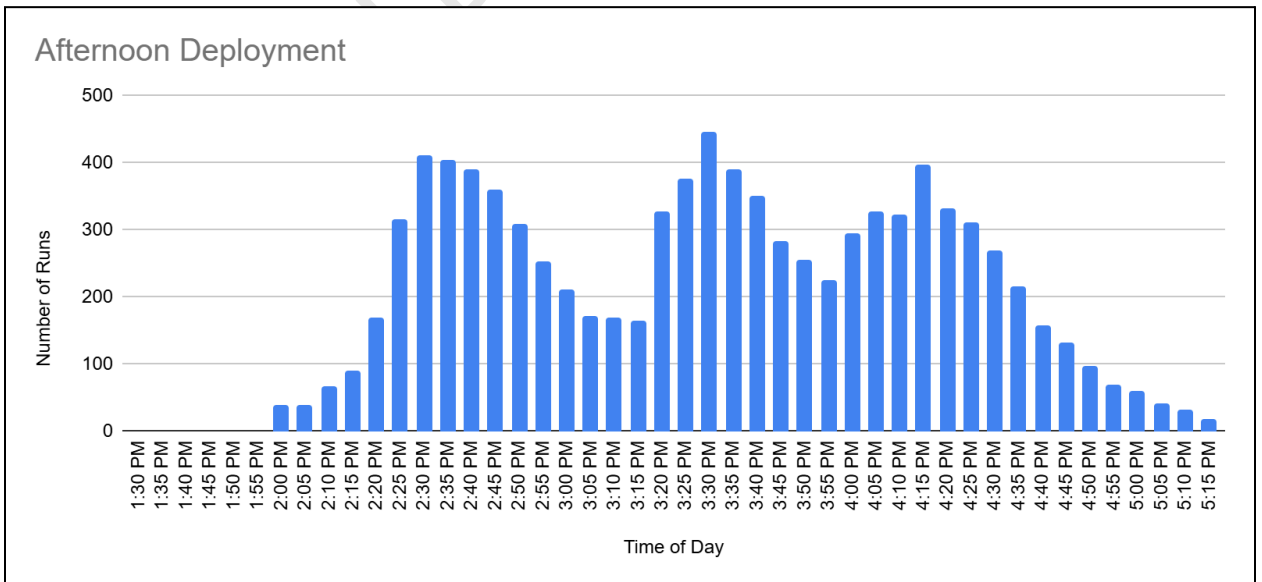


Figure C - Afternoon Fleet Deployment - 2024-25 school year



A 3-Tier transportation system has a theoretical maximum of six daily routes (three in the morning and three in the afternoon) for home-to-school service. To maximize bus efficiency, each bus should be used for as many unique routes as possible, thereby increasing the number of students transported per bus.

DCSD has an average daily run per bus of 5.12 and an average planned number of students per run of 39.95, as seen in *Figure D* below. These numbers indicate an efficient use of bell times in the routing, especially since the data includes all routes and programs.

Figure D: Key Capacity Indicators for Routing

Key Indicator	Totals
Number of Transported Students AM	61,721 students
Number of Transported Students PM	57,299 students
Active Routes	581 routes
Daily Runs per Bus Route	5.12 runs/route
Students per Run (planned)	39.95
Run Length (in minutes)	29.4 minutes

Finances

Bus driver salaries and benefits consume almost the entire Transportation budget, highlighting their essential contribution to student transportation.

- Transportation Budget
 - Total: \$39,420,355
 - Bus Drivers' Payroll & Benefits: \$39,249,355 (99.5%)
 - Supplies & Technology Subscriptions: \$171,000 (0.5%)

Fleet Services spending focuses primarily on maintaining operational readiness and fuel for the district's vehicles, while also investing in fleet renewal and non-maintenance needs.

- Fleet Services Budget
 - Total: \$35,517,495
 - Fleet Maintenance (Labor, Parts, Supplies): \$17,859,419 (50.2%)
 - Fuel Costs: \$10,000,000 (28.2%)
 - Other Expenses: \$7,658,076 (21.6%)
 - Includes \$4,500,000 for non-operational costs such as replacing non-school bus vehicles

The Transportation and Fleet Services Department's current budgeting methods do not allow for standard financial analyses that are commonly used in K-12 transportation. Integrating accounting functions for specific school transportation operations would enable improved cost assessment and better-informed decisions for operational improvements.

For example, transportation accounting functions could be divided into the following areas:

- To and from school
- Athletics
- Field trips
- Summer school

Additionally, separate accounting functions could be established within the support fleet by department, by location, or by vehicle application (e.g. facilities maintenance, delivery services, and personal use vehicles).

The Fleet Services budget currently encompasses expenses for both the school bus fleet and the support vehicle fleet. Industry best practices recommend that these budgets be distinct.

Operational Performance

The District's fleet consists of 1,467 vehicles. A significant portion, 983 vehicles, is dedicated to student transportation, while the remaining 484 vehicles support other District operations, such as facility maintenance.

- *VEU Measurement Values:* Based on standard Vehicle Equivalent Unit (VEU) measurement values, the estimated total VEU for the DCSD fleet is a value of 4,409, with 3,441 VEU for the District's school bus fleet and 968 VEU for the District's support vehicle fleet.

Industry benchmarks for VEU ratios include the following:

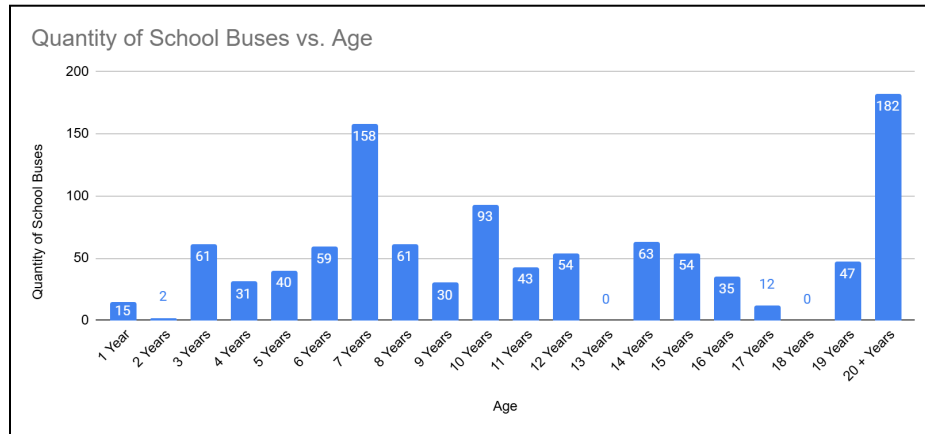
- 130 VEU / Technician: DCSD requires 34 Technicians to support its current fleet
- National Average Cost/VEU = \$1,900: DCSD cost per VEU = \$4,050

- *Fleet Maintenance Costs:* The District is spending almost twice the national average on fleet maintenance. These metrics are cause for concern. The age of the fleet, lack of internal controls for parts and supplies, and the absence of technician performance measurement may be contributing factors. There may also be a need to re-bid or seek competitive pricing from vendors for staffing technicians and for supplying parts. The parts contract alone is \$6,500,000, which translates to \$1,474 per VEU, leaving only \$426 per VEU for labor and supplies. Parts are only one of the measured values to benchmark fleet expenditures.
- *Technician Staffing:* The VEU analysis recommended a staffing level of 34 technicians, however, the organizational chart shows 43 technicians. During interviews conducted by CESO, supervisors and managers reported that only 60% of approved positions were filled. They also stated that additional technicians were being provided by an outside agency as temporary contract staff.

Overview of Current Fleet

- *Age of the Fleet:* The age of the current fleet is 11 years on average, while the school bus fleet averages 12 years. The national average age of school bus fleets is nine years old. Warmer climates tend to have older vehicles, while colder climates, which are harsher on vehicles, have newer ones. *Figure E* below shows the range of vehicle ages that are found within the DCSD fleet.

Figure E - Quantity of Fleet at Age Value - DCSD 2024-25 school year



- *Odometer Readings/Mileage:* The DCSD school bus fleet has an average odometer reading of 139,872 miles, while the overall fleet average is slightly lower at 121,063 miles. A common industry practice is to retire school buses after they exceed 150,000 miles, and almost certainly after 200,000 miles. Currently, approximately 20 percent of the school bus fleet, consisting of 202 buses, have odometer readings over 200,000 miles.

Staffing Challenges

- The Transportation & Fleet Services Department is currently understaffed, operating with approximately 60% of their target staffing levels. This translates to roughly 18 vacant mechanic positions and over 200 open bus driver positions. To manage the shortage, Fleet Services employs temporary contract staff to support fleet maintenance. Transportation has consolidated and reduced routes, while supervisors and drivers cover additional routes or split shifts daily to address the staffing gaps.
- The hiring process and communication with candidates were identified by Fleet Services and Transportation employees as challenges in filling vacant positions. Additionally, the duration of the hiring process was cited as a contributing factor. The Atlanta metropolitan area is a transportation and logistics hub, and therefore CDL bus drivers and experienced mechanics are in high demand. District staff reported that job applicants often accept other positions before DCSD can extend an offer.

Use of Technology

The *RTA Fleet Management* software program, used by the Fleet Services Division, has the capacity to record a wide range of information. This includes data on fleet and asset characteristics, parts and inventory, work orders, purchase orders, employee time and payroll. Additionally, the software can perform analytical functions related to this data, such as measuring average repair times, employee performance, and vehicle performance.

- CESO understands that the *RTA Fleet Management* software has not been fully implemented or utilized. The software is primarily being used by NAPA Auto Parts contractors to track parts purchasing and allocation. However, the system lacks internal controls and processes.
- The District currently uses *Edulog N/T*, an outdated routing program with a parent portal app, to create and maintain bus routes. While the system generally meets most routing requirements, it needs constant map updates to accommodate the District's growth. Additionally, it has limitations in editing incorrectly imported data and creating additional routing scenarios.
- New GIS maps are updated in *Edulog* twice a year. The routing system needs to be updated more frequently to accommodate the district's expanding growth areas. Bus stops and driver directions cannot be established, and students in new areas cannot be fully routed without the roads being accurately reflected on the map.
- The *Edulog* routing system's nightly import of student data from *Infinite Campus* is efficient, eliminating manual entry and updates. However, mismatches between *Infinite Campus* and *Edulog's* GIS data prevent student location and proper routing. This necessitates time-consuming collaboration with staff to rectify *Infinite Campus* data. This issue currently affects over 2,000 student records.
- Routing technicians currently hand-enter student data from *Infinite Campus* Special Education documents into *Edulog*. CESO recommends investigating whether this data could be included in the nightly import to eliminate this redundant step.
- The routing team would benefit greatly from the routing system's ability to create multiple scenarios, allowing routers to route different configurations, including new and temporary ones. CESO has identified this need within the District routing system.
- Routing staff require additional training. The current training for new routing staff, which is conducted by existing routers, is effective for teaching software use. However, it can lead to knowledge silos within the district and cause staff to miss software updates or new features. These knowledge silos can create inefficiencies in routing and job performance.

Key Findings

Areas of Excellence

- The DCSD Transportation program provides a vital service to families, safely transporting 61,721 students daily despite limited resources and a challenging labor market. This substantial operation covers tens of thousands of miles and bus stops each day, spanning the entire county and ensuring students have access to education.
- The transportation fleet is preparing to welcome 50 electric school buses, marking a significant shift towards alternative fuel vehicles. However, this transition will present various challenges. The initial year of operation can be considered a pilot program, as there will likely be a learning curve with aspects such as charging, route planning, and maintenance. For instance, it will be important to understand what happens if a charge is incomplete, which routes are most suitable for electric vehicles, how repairs differ from traditional engines, and how charging can be managed at external locations.

Areas for Improvement

- The existing fleet was not acquired as part of a fleet replacement plan, but rather through a series of unplanned purchases. Implementing a five- and ten-year plan would increase efficiency.
- The current staffing structure has two key areas for improvement:
 - Currently, there is no formal process for fleet replacement planning and the required supporting analytics to implement and maintain such a plan. While the Transportation Services Director is responsible for purchases, the Fleet Services Director lacks the official authority to inform fleet purchasing decisions.
 - In fleet management, and in other functions such as routing, the current staffing structure and job descriptions lack a formal analyst role. As the transportation industry becomes increasingly data-driven, analytical skills are growing in importance. It is recommended that the Fleet Services organization chart add one analyst position, and the Transportation Services organization chart add two positions: one for mapping and geographic information systems, and one for routing and operational analysis.
- Staffing levels within the Transportation Departments can likely be improved by collaborating with Human Resources to expedite the hiring process.
- The fleet management software, *RTA*, is not being fully utilized due to a lack of resources and training. Although *RTA* has the capacity to manage various functions within the fleet management organization, including work orders, purchase orders, technician

performance, and parts inventory, these functions are not currently being formally managed through other systems. To improve this, *RTA* software should be fully implemented and integrated into all aspects of the fleet management organization.

- The District's current routing software presents three primary areas needing improvement:
 - The District is currently seeking proposals for an updated routing program, as the *Edulog* routing software and its map, which is used to build bus routes, have not been updated in over 15 years. The map must be updated manually because current systems do not integrate with the District and County GIS files.
 - The current process of manual data entry by school staff, teachers, and educational aides into the transportation system is inefficient and prone to human error. This creates a significant workload for transportation staff, especially before the school year begins. Automating data transfer between the student information system and the routing software would streamline operations and reduce staff workload.
 - The existing seven-geographic region model currently used for routing is based on a map created for the 2021-2022 school year and does not yet align with the updated 2024-25 Areas and Clusters configuration. Subsequently, routing team staffing levels should be adjusted to align with these revised geographic regions.
- The current range of school bell times, from 6 hours and 30 minutes to 7 hours and 5 minutes, creates logistical issues for transportation, particularly when scheduling morning and afternoon routes. The same time windows in the morning do not align with the afternoon, leading to inefficiencies. Additionally, the demand for busing is significantly higher for the first and second tier bell times compared to the third tier. By shifting more schools to a later start and end time, and into the third tier, transportation resources can be reduced.

Plan for Action

Do Now

1. Develop a strategy for all Fleet Services staff, including technicians and supervisors, to begin utilizing the *RTA* software again.
2. Complete the RFP process, and select a routing software vendor that offers enhanced integration with the GPS and mapping systems (universal GIS files) already in use by other

District departments.

3. Develop a five- and 10-year fleet replacement plan considering the following factors: vehicle age, mileage, hours of use, technician time spent on maintenance, total financial input, desired make and model, desired fuel type, and desired quantity of each vehicle type in the fleet.
4. The existing seven-geographic region model currently used for routing is based on a map created for the 2021-2022 school year and does not yet align with the updated 2024-25 Areas and Clusters configuration. This should be updated on a regular basis (every year if possible).

Do Soon

1. Implement a data transfer between the student information system and the routing software to eliminate the paper "transportation change" paperwork.
2. Create dedicated analyst positions in both Fleet Services and Transportation to establish a staffing structure that supports analytical functions.
3. Develop a comprehensive fleet management plan for electric vehicles, encompassing:
 - *Charging/Fueling*: Strategies for ensuring consistent and accessible charging/fueling options for the fleet.
 - *Charging Infrastructure Ownership*: Clear delineation of responsibility for maintaining and repairing charging infrastructure.
 - *Technician Training*: Implementation of training programs to equip technicians with the skills to repair and maintain electric vehicles.
 - *Driver Training*: Development of training programs to instruct drivers on the proper operation of electric vehicles.

Do Later

1. Consider bell time changes that would balance all transportation demand equally across each of the three tiers. A balanced tiering approach can reduce transportation resources and thus operational cost.
2. The current transportation fleet services facility is no longer able to meet the needs of the District. Due to the District's size, future plans should include both updates to the existing fleet maintenance facility and construction of formal structures to replace the secondary repair facilities throughout DeKalb County.

Recruitment & Retention Strategies

Although the District's RFP focused on the Operations and Technology Services Divisions, individual department assessments revealed recurring HR-related themes such as staffing shortages and challenges in hiring, retention, and recruitment. To gain a deeper understanding of these challenges, CESO conducted three interviews with DCSD Human Resources staff. Consequently, this *Recruitment & Retention Strategies* section has been included as a resource offering relevant HR insights and recommendations. *It is important to understand that this section is not intended as a formal audit or assessment of the District's HR Department.*

Comprehensive Talent Acquisition Approach

A significant number of unfilled positions were reported across these two divisions. To explore potential solutions, CESO met with two leaders of Recruitment at DCSD in March 2025 to review the District's recruitment and retention strategies.

DCSD employs a strategic and multifaceted approach to talent acquisition, leveraging community and university partnerships to enhance recruitment efforts. The District's key strategies include:

- **Community Engagement** – Partnerships with organizations such as the Ethiopian and Latino communities and local groups to attract diverse talent.
- **University Collaborations** – Partnerships with Georgia State University and other institutions to create talent pipelines.
- **"Grow Your Own" Programs** – Initiatives such as the "Ignite Teacher Residency" and "Para to Teacher" programs to cultivate internal talent.
- **Targeted Student Recruitment** – Programs like "Hire to Hire" and "Aspire," which focus on high school students for roles in operations and teaching.
- **Specialized Job Fairs** – Regular participation in and sponsorship of job fairs, including those focused on operations and public safety.
- **Digital Recruitment Efforts** – Use of social media and online job boards, including Frontline (the District's applicant tracking system), LinkedIn, and Indeed.
- **Dedicated Talent Acquisition Team** – A team of approximately 27 Human Resources employees, including 8 Talent Acquisition (TA) Managers, who support specific areas within the District.
- **Data-Driven Strategy** – Active tracking and evaluation of recruitment efforts, including the return on investment of career and college fairs.
- **Re-Engagement & Feedback Systems** – The District reconnects with past applicants who may still be interested in employment. Hiring managers provide feedback on why candidates were not selected, and Human Resources follows up to suggest other suitable positions.

- **Expanding Talent Pools** – The District recruits from non-traditional talent sources, such as the VA hospital’s compensated work therapy program, recognizing transferable skills for roles like custodians.
- **Emphasizing Work-Life Balance** – The District highlights job quality, including predictable work hours, no weekend or holiday work, and, for some roles, no summer work.
- **Addressing Barriers to Employment** – Exit surveys revealed commute challenges as a key reason for employee departures. The District partnered with a third-party company to assist staff with housing and transportation.

Compensation Study Findings & Challenges

To further determine if staff retention and recruitment issues were stemming from compensation, DCSD completed a comprehensive compensation study in January 2024 after a year-long review of all positions. Findings from the compensation study related to the areas that CESO assessed included:

- All positions were reviewed, confirming market competitiveness.
- Bus driver and custodian pay was found to be competitive, but dissatisfaction persists.
- Student nutrition roles were adjusted to higher pay grades.
- Some employees received retention bonuses (\$1,000-\$2,000) based on start dates.
- Workforce stability issues persist, particularly for bus drivers and custodians.

In March 2025, CESO met with a member of the District’s Total Rewards team to gain a deeper understanding of the results and the steps taken to address them.

Future Considerations:

- While the Chief and Deputy Chief of Total Rewards are open to another compensation study, their priority is stabilizing the workforce.
- The District seeks a clearer classification and reclassification structure to ensure consistency and transparency.

Hiring Practices & Processes

In March 2025, CESO met with two DCSD Human Resources team members to better understand their hiring process and practices, and identify hiring and onboarding challenges. The District uses *Frontline* to facilitate its hiring process, which includes various approval steps, screenings, and onboarding measures to ensure compliance, efficiency, and support for hiring managers.

Job Requisition & Posting: School-based positions are created in Frontline and require approval before posting. Non-school positions use a central office form with attached job descriptions and

also require approval. Positions are posted after ensuring required forms are submitted, a step hiring managers cannot bypass.

Application Process: Candidates apply easily through Frontline, which requires minimal fields and has no mandatory questions.

Candidate Screening & Interview Process: As of September 2024, Talent Acquisition Managers provide 5-20 qualified candidates to hiring authorities, who conduct interviews and submit recommendations via Frontline or email. Additional candidates require Talent Acquisition Manager approval.

Hiring Manager Training: Hiring managers were trained on the updated hiring process in September and December 2024. These sessions were recorded and PowerPoint materials were provided.

Reference & Background Checks: Reference checks and conducted by hiring managers but are not required. Candidates are responsible for the cost of a background check which is handled by the Public Safety Department.

Offer & Onboarding: Hiring involves a verbal offer from the hiring manager, followed by a formal offer letter from the Talent Acquisition Manager. Standardized orientation covers compensation, benefits, and leave for all new employees. New teachers attend a 2-3 day summer New Teacher Orientation. Building/division-level orientation occurs throughout the year as needed.

Job-Specific Training: Bus drivers will shadow experienced drivers for one week. New teachers will be paired with mentors and receive support through networking sessions.

Filling Vacancies: Human Resources is improving the hiring process to quickly select qualified candidates, requiring same-day contact for recommended hires. The aim is to complete the entire process, including fingerprinting, within 14 days, contingent on candidate responsiveness.

Factors Contributing to Delays in Hiring:

- *Prioritization of Staffing Needs by Leaders:* One significant factor is that some leaders are not making staffing a consistent priority. For example, positions are often posted but left inactive for extended periods, sometimes for up to 365 days, because leaders have found ways to work around the staffing need rather than addressing it directly.
- *Reactive vs. Proactive Hiring Practices:* Hiring managers tend to be reactive rather than proactive when it comes to their staffing needs. This results in delays as positions are only filled when the situation becomes urgent, rather than planning ahead with staffing forecasts.
- *Lack of Consistent Communication and Planning:* Regular bi-weekly meetings with TAMS (Talent Acquisition Management System) to address timelines, staffing needs, and

forecasting would be an effective solution for improving hiring goals. Unfortunately, this practice is not consistently being upheld.

School Nutrition Services-Specific Challenges & Solutions:

- *Candidate Pool and Retention Plan:* School Nutrition Services is in need of a refreshed pool of interested candidates, as well as a comprehensive retention plan to ensure long-term staffing stability.
- *Proactive Training Program:* Human Resources is currently working with the Executive Director of School Nutrition Services to implement a two-week paid summer training program for new hires in School Nutrition Services. This program will help train and properly onboard new staff to ensure they feel supported and prepared in their roles. Since the food industry is highly competitive, this initiative aims to improve retention and make DCSD more attractive to potential candidates.

HR Recommendations

- Continue the multifaceted approach to talent acquisition, leveraging community and university partnerships to enhance recruitment efforts. DCSD excels in removing barriers for candidates who often fill hard-to-fill positions. Maintain these efforts and ensure hiring managers are informed and aligned with this approach.
- To enhance the hiring process and improve new hire retention, all hiring managers should receive annual training. This training should encompass their specific roles and responsibilities, compliance requirements, effective candidate selection techniques, and strategies for fostering a positive onboarding experience. Consistent training will lead to a more efficient and effective hiring process, and a positive onboarding experience will increase retention rates, as the first few months are crucial in an employee's decision to stay.
- Develop a *Hiring Manager Guide* with clear instructions, key timelines, FAQs, interview and selection best practices, and HR contact information to assist hiring managers throughout the hiring process. Update the guide regularly to align with policy changes and process improvements.
- HR should establish and maintain consistent communication with hiring managers regarding the status of their job postings, especially those that are hard to fill and remain open for a long time. This includes regular updates on the posting's approval and recruitment process, the number of applicants, and any proactive recruitment efforts.

- To enhance the recruitment process for hard-to-fill positions, a Job Posting Status Update System should be implemented. This system would provide hiring managers with regular reports or dashboard access, allowing them to track the progress of open positions. In addition, Human Resources should proactively offer recommendations for alternative recruitment strategies, such as targeted outreach or job fair participation, to attract a larger pool of qualified candidates.
- Enhanced collaboration between Human Resources and hiring teams can be achieved by fostering open communication and transparency. This allows hiring managers to better plan their interview and selection process, reducing frustration and streamlining the hiring process.
- In order to boost morale, increase engagement, and improve retention, implement a targeted staff recognition program tailored for positions with high turnover, such as bus drivers, custodians, student nutrition, and other operational roles. Key components of the staff recognition program could include:
 - *Regular Acknowledgement*: Hold monthly or quarterly recognition events where staff in high-turnover roles are publicly acknowledged for their hard work and contributions. This could be in the form of "Employee of the Month" awards or informal recognition during team meetings.
 - *Peer-to-Peer Recognition*: Create a platform or system where staff members can recognize their colleagues for outstanding performance, with a focus on appreciation for roles that are critical but often go unnoticed.
 - *Milestone Celebrations*: Celebrate work anniversaries and milestones, such as completing a certain number of years of service, to show long-term employees they are valued. Offering small non-monetary rewards or extra time off can be meaningful for these employees.
 - *Retention Bonuses*: In addition to formal recognition, consider providing retention bonuses or incentive programs tied to employee tenure, especially for those in roles with persistent turnover.
 - *Personalized Recognition*: Recognize individual accomplishments or improvements, such as positive customer feedback or exemplary performance in a challenging situation, to ensure staff feel seen and appreciated for their unique contributions.
- To avoid last-minute hiring decisions, leadership should shift from reactive hiring practices to strategic workforce planning by regularly assessing current and future staffing needs. Incorporate forecasting discussions into leadership meetings and develop staffing plans

that align with anticipated vacancies and programmatic changes.

- Prioritize and reinstate bi-weekly meetings between hiring managers and HR using the Talent Acquisition Management System (TAMS). To ensure alignment and accountability, leadership should consistently attend and follow through on these meetings, which should focus on hiring timelines, open position review, and forecasting.
- To address the unique challenges in School Nutrition Services, CESO recommends the following targeted actions:
 - *Candidate Pool Refresh*: Launch recruitment campaigns specifically tailored to the food services sector, with targeted messaging and community outreach to build a sustainable pipeline of interested candidates.
 - *Retention Strategy Development*: Collaborate with the Executive Director of School Nutrition Services to finalize and implement a long-term retention plan that includes professional development, recognition efforts, and career growth pathways for employees.

Revised Draft 6/1/2025



Section IV

**Information & Instructional
Technology Division Assessment**

Division of Information and Instructional Technology

Executive Summary

This assessment provides an overview of the current state of the Information and Instructional Technology Division (Technology Services Division) within the DeKalb County School District (DCSD). It identifies strengths, weaknesses, and opportunities for growth, aiming to provide the Superintendent with an understanding of the Division operations and systemic recommendations.

The Technology Services Division encompasses the information and instructional technology functions of the District and demonstrates a cohesive culture with high expectations and shared values. The leadership team is professional, identifies strengths and weaknesses, and aligns its work with district goals. The Division is well-aligned with supporting the District's MIRACLE goals and is a valuable asset, particularly in the face of growing cyber threats.

Identified areas for improvement primarily involve complex projects requiring long-term planning and investment. These include developing multi-year budgeting for technology infrastructure, enhancing cybersecurity measures, implementing data classification and loss prevention strategies, and formalizing policies and standard operating procedures.

Overall, the DCSD Technology Services Division operates with maturity and dedication, supporting the District's mission and strategic goals.

Introduction and Background

The District has recently hired new leadership in three key technology services positions: Chief Information Officer, Manager of Data Center & Cloud Services, and Director of Information & Network Security. Several of the other technology leadership positions were hired within the last 2-4 years. Whether a department veteran, or on the list of recent hires, the Division presents a cohesive culture of high expectations, respect for the institution, and shared values that support their work together. Division staff were observed to hold each other in high regard and made numerous positive comments about their new Chief Information Officer. The level of cohesion and trust feels uncommon and should be viewed as a significant asset to the District.

Throughout the assessment, department leaders were quick to identify their own division strengths and weaknesses, priority areas for improvement, and an understanding of how their division was aligned to the larger department and district goals. It should be expected that the technology leadership team would largely view this report as an accurate reflection of their current reality. As might be expected, given the team's high level of professionalism, there were no observed "blind-spots." The team knows, and embraces, their role within the larger system.

The DCSD Technology Services Division is well aligned to support the District's MIRACLE goals for Technology. The Superintendent should be aware of the value of this District asset. As cyber threats grow and K-12 systems work to build system defenses, DCSD has a team that is doing the right work. It should be noted that due to the maturity of operations, identified areas for improvement are not "low hanging fruit." In general, these are more expensive projects that will take years to mature.

Approach to Work

The assessment encompasses the current state of the DCSD Technology Services Division, key discoveries, and an action plan. The results highlight areas where the Division excels, areas that need improvement, and recommendations for the District's future.

The assessment is based on interviews with Technology Services Division department managers, and notes were taken to document key information, challenges, and successes. The information gathered during the interviews was then validated through a combination of school site visits, document reviews, and follow-up conversations. The CESO team also held regular meetings to share information, confirm findings, and align expectations. *A list of participants in various interviews can be found in [Exhibit G](#) of the Appendix.*

Information Gathering & Analysis

For this assessment, documentation was requested and received to support the evaluation of department priorities in alignment with District goals. Documents analyzed, including the District's Strategic Plan, Technology Plan, E-SPLOST documentation (i.e., Priorities, 2022-2025 Technology Plan, Goals and Miracles for Technology). The assessment process also involved examining the District's website and the data accessible on it.

Observations & Interviews

Interviews were conducted with managers across the Division including Network Operations, Information Security, Physical Security, Asset Management, Instructional Technology, Project Management, and others. Follow-up interviews were conducted as needed. Individual department managers provided backup documents which included budgets, organizational charts, procedures, and protocols. Site visits were conducted at eight schools, encompassing elementary, middle, and high schools, where interviews were held with teachers, students, principals, and support staff. Additionally, department managers supplied supporting documentation, such as budgets, organizational charts, procedures, and protocols.

Through this process, the departments were assessed in order to identify initiative priorities, alignment of those priorities, and the ground effect of the department's initiatives. The goal was to evaluate whether the experiences of staff and students reflect the intentions and actions of District technology leadership.

Assessment & Comparison

This assessment establishes goal markers by analyzing guiding documents and leadership expectations to evaluate the department's vertical alignment with the Division's organizational expectations. The primary sources for this analysis include: The Strategic Plan 2024-2029, Portrait of a Graduate, MIRACLES Goals, the outgoing 2025 Technology Plan, and current technology needs in physical security and cybersecurity. The assessment also takes into account the initiatives and their outcomes within the broader context of both District and CESO national experiences.

Current Reality

Organization and Staffing

The organizational chart and staffing structure for the Technology Services Division is well structured with clear role definitions; including the identification of current vacancies. The team values the structure in place, understands how to work within that structure, and takes an active role in its ongoing development. This leadership team also demonstrated value and respect for the organization, their role within the organization, and their peers. The team holds a very high level of commitment to the families, classrooms, and schools they serve. This commitment is pervasive within the culture of the Division and can be observed through the team's dedication to the District's mission and their strategic approach to delivering high quality services in all areas of need.

Responsibilities within the leadership team are described below:

- **Project Management Office (PMO):** The Manager is responsible for the leadership and oversight of over 30 current projects, ranging from large construction projects to specific network upgrades. Project management follows the PMI (Project Management Institute) model with clear deliverables. This position requires extensive coordination of District staff both in and out of the Technology Services Division.
- **Information & Technology Security:** The Director started working at DCSD recently and is evaluating the current state of security. He is using the most recent audit data to create a strategic plan and direction.
- **Instructional Technology:** The Manager is responsible for ensuring successful educational technology implementations by providing professional development and support. Staff collaborate with principals and instructional leads to understand initiative goals and then assist staff in achieving those goals. This role is essential for expanding educational technology programs within the District. The Instructional Technology team consists of 9 specialists, 2 liaisons, and the Manager III.

- **Student Information:** The Manager supports the student information systems and instructional technology teams. This position oversees all state reporting and records management; including master scheduling, transcripts, and systems integration. This role is responsible for managing the backend of all educational technology enabled software systems.
- **Asset Management & End User Computing:** The Manager is responsible for the oversight of the District's entire computer fleet; including laptops, chromebooks, macbooks, and ipads. The department utilizes Mobile Device Management (MDM) tools to support fleet management tasks like deploying devices and/or patches. The workstation images are utilizing a secure configuration that includes best practices. Recent system migrations have been completed or are in process to support the continued management of all systems.
- **Data Center & Cloud Services:** The Manager is responsible for overseeing all servers and services, both on-premise and cloud-hosted. The primary focus is on evaluating the Return on Investment (ROI) and Total Cost of Ownership (TCO) for these systems. Based on these financial assessments, the Manager leads efforts to modernize existing systems, enhance security by implementing industry best practices, and manage legacy systems. Although this work is often behind the scenes, it is critical to the organization's daily operations.
- **Network Services:** The Manager oversees all network and Internet operations, including wireless access, point-to-point fiber optics between facilities, wired network systems, core routing, firewalls, and network level security. The Department follows best practices for network design and is creating the Center for Internet Security version 8 (CIS) aligned Standard Operating Procedures (SOPs). Additionally, it utilizes notification services for network vulnerability alerts and has deployed a system for managing, backing up, and patching its 2300+ network switches and other deployed network equipment.
- **Information & Innovation:** While there is no standard for technology innovation in K-12 environments, a department dedicated to information and innovation has the potential to significantly advance technology integration. This type of initiative can foster the development of the District's Portrait of a Graduate priority areas (*Reflective & Resilient Learners, Globally Engaged Citizen, Creative & Dynamic Learner, Effective Collaborator, Effective Communicator*) in addition to creating authentic engagement and new avenues for personalization. Furthermore, it can connect District initiatives around student outcomes with post-secondary opportunities.

The Executive Director of Information and Innovation leads the Department which has engaged with business associates to develop a program that aligns District pedagogy and standards achievement expectations with their *Portrait of a Graduate* work. The work of

this Department provides unique value to the organization that can only be achieved when built upon the foundation of stable and mature operations established by the other Technology Services departments.

- **Enterprise Telecommunications:** The Telecommunications Department is responsible for managing the District's communications infrastructure, which encompasses cell phones, office phones, voicemail, mobile device management (MDM), Session Initiation Protocol (SIP) lines, and other hardware components. This equipment is essential for emergency response and is managed in compliance with e911 requirements. The Department also utilizes services like *FirstNet (AT&T)* call prioritization to enhance communication capabilities. Current SOPs for onboarding and offboarding are in place, but the Department has recognized the need for a clear policy on cell phone allocation and a subsequent audit of current assignments to align with that policy.
- **Physical Security:** The Manager is responsible for enhancing physical security by overseeing security cameras, door access, motion detection, and intrusion prevention. The department aims to standardize procedures to ensure consistency across the District.
- **Technical Support Services:** The Manager oversees the entire lifecycle of all technology, from procurement and deployment to repair and end-of-life replacement. This includes defining device specifications, forecasting replacement counts and costs, and managing inventory. The Department also manages the one-to-one student Chromebook program and maintains a significantly lower than expected loss and damage rate for student devices.

The Technical Support Services Department provides classroom-level support with an optimal technician staff-to-student ratio of approximately 1500:1. Interviews with technicians, building staff, and students reveal that support operations are well-executed due to a shared sense of community and duty of care for all learners. This fundamental support is essential for the District's Information and Innovation initiatives.

- **Business & Operations:** The Manager is responsible for overseeing e-stores, special projects, vendor management, and purchasing policies and procedures for technology. The Manager ensures alignment with Finance expectations, oversees E-SPLOST initiatives, and manages departmental budgets. This position is critical to the management and oversight of \$43M+ in staffing costs and technology expenses.
- **Applications & Data Services:** The Executive Director oversees all processes for account creation and user rights management. Additionally this department oversees all data services and data governance practices. Following the recent success in migrating the ERP system, the work is now focused on developing robust data classifications and data loss prevention strategies.

- **IT Support Services:** The Director oversees the management of the ticket system to guarantee precise data tracking and accountability, ensuring high standards of technology support are accessible across the district. The Department also manages all repairs, promoting a fully functional technology environment throughout the DeKalb County school system.

Policies and Practice

The Division currently depends on the established and stable practices of long-term experienced staff rather than on formal policies and documented SOPs. Although some policies and practices are in place, and necessary SOPs have been identified, there is a need for further development in these areas. An area of significant focus for this work in K-12 organizations is cybersecurity. The team recognizes the importance of this work, particularly in cybersecurity, and has incorporated it into their strategic planning and Miracle goals.

- **Project Management Office (PMO):** The Project Management department prioritizes projects based on the Chief Information Officer's input, using a project request process within Incident IQ and adhering to well-documented standard operating procedures.
- **Information & Technology Security:** Cybersecurity is a developing area in K-12 and DCSD recently hired a cybersecurity expert to review, recommend and implement an effective program. Some security policies and procedures exist, and many others need to be created. The Director is very aware of their Division's current reality and has a plan in place to significantly elevate the District cybersecurity operations.
- **Instructional Technology:** The Department partners with principals to create individualized Digital Roadmaps for each of the 138 locations, detailing technology integration goals and methods. This involves aligning district-wide technology objectives with the specific needs of each school by bringing together key personnel from both levels. The effectiveness of this alignment is demonstrated by the consistent technology application seen across the District during visits with principals, staff, and students. The District has successfully established a balance between standardized technology use and support and the unique requirements of individual sites.
- **Student Information:** The Instruction and Innovation Department supports and operates the Student Information System management. Application, use, and development are managed to align with the District's instructional needs and vision.
- **Asset Management & End User Computing:** The Division employs standard operating procedures for asset management, including RFP processes for procurement. It also has a plan for obsolescence and replacement of aging devices, such as tablets, laptops, and

desktops. The Division adheres to the organization's device replacement policy, and user experience confirms the effectiveness of the Division's programs.

- **Data Center & Cloud Services:** Cloud services are operating within expected security and reliability parameters. Governance documentation is being established, but policy for this area should focus on guidelines and standards for secure cloud and data center service implementation. Broader cybersecurity governance will be addressed under Information & Technology Security.

The Division follows best practices for implementing new, secure cloud services and uses validated secure server images. Disaster Recovery & Business Continuity planning, a strategic MIRACLES goal, is a pending project that may be more complex than leadership anticipates. While basic plans can be developed quickly, mature plans require years of dedicated effort. Utilizing third-party consultants could accelerate the initial phase. Successful implementation will require sustained leadership attention.

- **Network Services:** The Network Services Department appears to be successfully implementing, securing, developing, and maintaining network infrastructure resources overall. Senior-level interviews and site-level conversations confirm that the network infrastructure is robust and reliable, with only a few isolated mentions of recent wireless instability. The Department would benefit from additional guidelines and standards.

The Network Services team understands the importance of their role in supporting 100K users reliably; they have designed and delivered internet, network, WAN, and wireless systems that meet the operational requirements of DCSD. The size and complexity of the organization leave little room for error, but the team has excelled in addressing this priority through quality system design and redundancy measures. Their success is evident in their ability to support large-scale events, such as the simultaneous administration of standardized tests to all students, which is a key benchmark of their effectiveness.

The recent wireless upgrade will likely bring improvements in overall reliability and the ability to quickly diagnose and resolve future issues. This is due to the modern technology and its associated support tools. The *Aruba* system is considered one of the best solutions for high-density K-12 operations. The District should expect continuing challenges due to older buildings as the department addresses older closets, electricity demands, and pending switched network equipment replacements.

- **Information & Innovation:** The Information and Innovation Department should work closely with the Curriculum and Instruction Department to ensure that technology systems support academic goals. While this area isn't directly governed by policy, its practices influence District outcomes. Strong trust-based relationships with the Curriculum and Instruction Department and school-site staff are essential. The positive

correlations and high satisfaction reported at visited locations indicate that these relationships should serve as a model for policy and practice development across other Technology Services departments. Key areas impacted include online gradebooks, assessment tools, data analytics, Chromebook program operations, and technology curriculum support.

The District's investment in innovative practices is evident in its technology fair and specialized technology innovation classes. Notably, Library Media Centers (LMC) partnerships are strong and support both standard and innovative technology solutions. Middle school technology programs emphasize innovation, critical thinking, problem-solving, and real-world technology applications. The connection between technology, curriculum, and the shared goal of improving student outcomes is pervasive.

- **Enterprise Telecommunications:** The District has made progress in modernizing its phone system with the move to VoIP (Voiceover Internet Protocol) and SIP. However, the absence of a formal written policy for mobile device management is an area that requires further development and formalization through documented policies and standard operating procedures. The budget for the cell phone program should be reevaluated and a clear policy for device allocation should be established.
- **Physical Security:** The *Physical Security Refresh for Door Access Control, Intrusion Alarms, and Security Cameras* is a significant project for DCSD. This includes the upgrade of over 7,000 cameras, hundreds of door card access and building alarm systems. The Physical Security Department is looking into ways to meet the needs of individual systems while also taking advantage of any potential benefits that may arise by integrating these systems.
- **Technical Support Services:** The current technology support procedures are effective and well-understood by staff and students. This success is attributed to site-based technical support staff who are committed to providing excellent support, as well as several other factors including: designated Chromebook Liaisons and Media Center Professionals, the integration of technology initiatives with the Curriculum & Instruction Department, and a software environment designed to provide easy access to digital learning resources.
- **Business & Operations:** Fiscal responsibility is one of the District's primary principles. The Department follows purchasing guidelines, including requirements for quotes, contracts, and legal review.
- **Applications & Data Services:** The Applications and Data Services team supports the onboarding and ongoing support of all District data systems. This work funnels requests for new software through the app development team for review. This review identifies integration, security, and privacy concerns prior to software adoption and implementation.

The team is currently looking into the development of a similar review process for technology hardware, though this review process would look at cost, compatibility, security, and integration. The Department uses an 'e-store' to provide the organization with easy access to approved and vetted applications following industry best practices.

- **IT Support Services:** The IT Support Services Department has a clear structure for handling technical issues.
 - The process begins with the Call Center, which serves as the initial point of contact for all technology-related inquiries from staff, students, and the public.
 - IT Technicians (ITTs), located in schools and administrative buildings, provide on-site initial assessments and troubleshooting before escalating to higher levels of support.
 - Desktop support handles second and third-level support for issues like printers and other technical problems not related to networking.
 - Specialized teams address more complex issues such as network operations and application support.
 - A ticketing system tracks all issues, ensuring a consistent and formal approach to support throughout the organization.

Feedback from site visits and interviews confirms that users understand and are satisfied with the process for requesting and receiving technology support. Positive user perception of technology support is influenced by several factors, including:

- Standardized help ticket system to ensure accountability;
- Hardware and software standards that align with user expectations;
- Adequate staffing levels to maintain sufficient coverage; and
- Comprehensive training program that encompasses both technical and learning system usage for teachers and staff.

Finances

Technology financing is unique within K-12 school systems. Challenges typically stem from the historical transition from capital expenditures to operating expenditures, the yearly fluctuations in large capital purchase requirements, and the current dependence on secondary funding sources to fulfill budgetary needs.

- In general, technology departments create large numbers of purchase orders, require receiving and inventory procedures, and must anticipate annual repair costs for a wide variety of equipment that didn't exist 10-20 years ago. Many systems have been assigned to technology departments over the years, increasing their responsibilities for items including radios, security cameras, HVAC (Heating, Ventilation and Air Conditioning) control, and electronic door access.

- The CIO and the Manager III of Business and Operations are developing their system for managing the Division's finances. While this can be a difficult task for a new technology leader, the Business and Operations Manager's experience and previous work has made the transition much easier. A technology leader who collaborates closely with the Finance office is essential given the \$40M technology funding obligation.
- DCSD is receiving funding through E-SPLOST, State Revenues, and Federal Revenues via reimbursements. It's important to note that Federal eRate funding is not guaranteed and comes after expenses have been committed. Currently, the validity of eRate's funding source is being debated in the Supreme Court of the United States on the basis of USAC (Universal Service Administration Company) defined fees being an unconstitutional tax. These uncertainties could impact future planning.
- Given the scope of technology projects and application processes required to secure the needed funding, there is an additional planning and communication component that Division leadership need to consider. The Superintendent and Chief Finance Officer need to understand the annual scope of project funding requests, sources, and impact; as unexpected changes to these funding streams would have a significant impact on expected department operations.
- Internally, the Technology Services Division understands its financial obligations and responsibilities well. The coordination of department leadership around finances is apparent in every department, notably project management, device management and inventory, server services, networking services, instructional technology, and physical security. The District should expect additional costs due to potential increases in tariffs on devices (laptops/desktops/Chromebooks) and the evaluation of power requirements for network closets in older buildings that are expanding services.
- The Technology Services Division effectively manages its extensive inventory of depreciable equipment, which includes devices, printers/copiers, network equipment, server equipment, security cameras, and various other electronic components. The department maintains auditable database records for all technology inventory, encompassing ordering, receiving, inventory tagging/recording, monitoring deployed assets, and tracking moves, adds, and changes.
- The Manager III of Business and Operations has established stringent purchasing protocols to ensure responsible management of technology funds and assets. These protocols encompass controls on spending thresholds, segregation of purchasing duties, standardized forms and processes, and meticulous tracking mechanisms. They further mandate that all Division departments submit their budget requirements, which are then consolidated into a master spreadsheet for the CIO's review. This oversight enables the CIO to preemptively identify budgetary concerns or redundancies during the planning

phase, and to monitor departmental adherence to budget allocations throughout the fiscal year.

Operational Performance

Technology operations is the process of purchasing, deploying, supporting or maintaining, and end-of-life destruction or replacement of all district technology. Basically, the process encompasses how users are supplied with a new laptop, receive technical assistance throughout the laptop's lifespan, and eventually get a replacement when necessary. *Operational Performance* involves the processes supported through the help ticket system; where users can request and receive the support they need.

Successful department operations is a test of technology systems, department communications, cultural expectations of the organization, and the human relationships that exist. Where one organization might see technology support as the process of repairing broken equipment, another might see it as helping people with their technology issues. The difference in philosophical approach has a broad impact on how building staff in a K-12 institution view their relationship with the Technology Services Division. DeKalb County School District (DCSD) has cultivated strong, positive relationships between its technology services departments, district and school administrations, and even individual classrooms. This collaborative approach highlights a successful model for technology support delivery.

Walking through the halls of DCSD schools, it is obvious that students are being taught responsible use of technology devices as modeled by building staff. The tenet of *Respect* is held throughout the hallways and can be observed casually or through initiated conversations with students and faculty. Field technicians are professional, efficient, and knowledgeable. Building staff view the Technology Services Division positively and feel supported. The cultural components of respect, high expectations, and compassion were highly consistent throughout all visited buildings and not unique to technology related staff. Field technicians view themselves as educators with important and significant responsibilities to the students and staff they serve.

Use of Technology

The Technology Services Division's utilization of technology tools showcases the high levels of expertise and experience within the District. The selection and implementation of these tools are noteworthy and deserve recognition.

- **Project Management:** *Incident IQ* is used to manage support and project requests. The extensive list of projects makes accountability and tracking essential. *Incident IQ* allows for the monitoring of timelines, benchmarks, costs, and current status for each project.
- **Student Information Systems & Instructional Technology:** The District utilizes *Infinite Campus* for student information, *Canvas* as their learning management system, and *Clever*

for application rostering. These core systems are well-supported and effectively meet the District's needs.

- **Instructional Technology:** The District utilizes numerous tools managed through rostering applications and accessible to both staff and students.
- **Asset Management:** Devices are tracked with *Frontline Asset Management*.
- **Data Center & Cloud Services:** *Microsoft Office 365* and *Azure AD* are managed by the server. This is widely regarded as a safe and reliable server model.
- **Network Operations:** Manages network infrastructure, including routers, switches, and firewalls.
- **Physical Security:** The *Lenel* system is being implemented for physical security, using software to unlock doors.

Key Findings

Areas of Excellence

Project Management: The Technology Services Division exhibits established processes for project intake, prioritization, and implementation. The CIO and the Division departments collaborate closely to ensure that planning priorities are aligned with District requirements.

Student Information System: DCSD has a strong student information system manager capable of implementing, migrating, and enabling data integration across learning systems. Reliability of the student information system (*Infinite Campus*) and its two-way integration with the learning management system (*Canvas*) is foundational to the operation of all District operations.

The critical and intricate nature of essential operational processes is often overlooked by organizations that underestimate their breadth and potential consequences. These procedures, which include attendance, grading, transcript reporting, discipline tracking, enrollment, scheduling, state and federal reporting, and data flow management for all learning platforms, are fundamental to the effective functioning of any school district. They also involve managing student and parent accounts and the integrated management of student-related business systems that support crucial services like school nutrition, school payments, and transportation.

To ensure the smooth execution of these procedures, it is necessary to employ data flow automations, scheduled and coordinated operations, manual data synchronization and validation, and communication and coordination efforts across all district schools throughout the year.

Instructional Technology: Professional development is fostered through *Ignite*. Teachers and leaders are provided with unwavering support.

Asset Management: The District effectively manages a large number of devices through their acquisition, deployment, and lifecycle. The District's methods for managing the Chromebook program should be highly valued as it successfully preserves the program through loss rates below 5% (typical loss rates are 6-12%).

Two key strategies that support this outcome are the on-site Chromebook Coordinator stipend positions that perform required inventory assessments and the summer exchange process. This enables the District to demonstrate strong fiscal management responsibilities by safeguarding an expensive and effective program (one-to-one Chromebook assignments). Additionally, site visits revealed that all buildings consistently demonstrated clear expectations and common language regarding appropriate device use and care.

Data Center & Cloud Services: The District displays a proactive approach to cleaning up the environment and planning for the future.

Physical Security: Regular updates on security projects are shared with the School Board.

Call Center/Help Desk: The Call Center serves as a single point of contact for all technical issues.

Purchasing: The Technology Services Division strictly adheres to all purchasing guidelines and policies.

Areas for Improvement

Technology Planning & Budget:

- Identify all areas for multi-year budgeting to align with current use and planned or potential growth. When doing so, consider the following areas: staff and student devices, classroom displays, building digital signage, wireless network, wired network, network appliances (firewall, dhcp/dns, vpn, etc), environment monitoring, door controllers, server systems, primary and secondary UPS systems, generators, primary/secondary data center fire suppression, network video surveillance servers, surveillance cameras, district-owned metro area fiber-optics, and any foreseeable wiring projects related to new construction or the planned replacement of obsolete building data wiring (Cat5 or below).
- DCSD is a large district with aging buildings that have been retro-fitted to support technology needs. As such, network closets, server rooms, MPOE (Minimum Point of Entry) locations, and other technology service locations are often shared and may co-host janitorial sinks and other equipment, or may be used as small offices.

Over the years, the power requirements for building switch equipment has increased substantially due to the adoption of Power over Ethernet (PoE) standards. While the original PoE standard provided up to 15 watts of power per switched port, PoE+ can

consume 30 watts, PoE++ can consume 60 watts, and some standards expanded up to 90watts. This power is used for wireless access points, office phones, security cameras, PA system components, timeclock stations, wall clocks, environmental and equipment monitoring devices, and more. Some newer buildings are now using PoE based lighting solutions. The increase in power demand in affected network closets has been, and continues to be, significant. A typical stack of network switches in 1995 might have consumed a total of 650 watts of electricity; in 2025 that same stack would be estimated at closer to 3000-5000 watts requiring multiple dedicated electrical circuits.

Additionally, since electricity converts to heat with 100% efficiency, that increased power draw contributes up to 15,000 BTUs of heat to the room, which is similar to a backyard propane smoker. Removing this heat to prevent damage to the equipment would then also require 15,000 BTU air conditioner, adding another 1500 watts of power demand and potentially require the installation of new ventilation ducting. That is all to highlight that adding the required service capacity in older buildings may take additional planning and have significant budget implications beyond simply purchasing additional network switches. Interviews confirmed that this is a growing area of concern as more network service closets are operating on the cusp of available power and existing ambient cooling capacity.

- The Senior Manager of Network Operations is aware of the above power requirements. Additionally, a Cable Management Plan has been developed that proactively identifies cabling standards and needs within the District. These needs should be considered in the budget process as they align with expected system upgrades in the identified buildings.
- The Technology Services Division prioritizes operating on reliable, secure, licensed and supported network equipment. This equipment typically has a supported life of approximately eight years; and long term budgeting should account for network switch and wireless access point upgrades on a staggered eight-year timeframe.
- Classroom displays (Projector or Large Screen Display) are difficult to judge as they are typically specified to run for 20,000 hours (10-20 years) but only accommodate a five-year warranty. This newer technology is still developing with a reasonable life-cycle expectation of 10-12 years for budgeting purposes. Depending on the budget replacement cycle adopted for displays, the maintenance of this program will cost approximately \$1M per year.
- For other equipment, it is recommended that budget projections are included when the expense is identified (e.g. when the *Mitel* phone system end-of-life date is announced).
- The Operations III Manager exhibits a strong understanding of the Technology Services Division budgetary requirements, maintains meticulous records, and has established

sufficient protocols for procurement that align with State regulations and competitive bidding mandates. In addition to current requirements, this comprehensive budget planning is needed to foresee funding obstacles to maintaining existing technology programs and incorporating potential new initiatives. This may be thought of as a simplified technology version of the Long Range Comprehensive Facilities Plan.

Cybersecurity:

- Develop protocol for labeling and classifying cybersecurity documents. This should reflect the standard practice of Policy, Procedures, Standards, and Guidelines. Staff responsible for specific cybersecurity roles have already begun this work in the areas of department policy and procedures. Given the evolving NIST (National Institute of Standards and Technology) 2.0 standards and the escalating security threats, this work needs sustained attention and support from the District's highest levels of leadership.
- Existing Security Policies address the primary areas of: Logical Access Policy, Password Policy, IT Training & Awareness Plan, Acceptable Use Policy, Risk Assessment, and Remote Access Policy. Additionally, the Department has developed a Business Continuity Plan and Incident Response Plan. These documents originated in 2021 and should be reviewed regularly; and that review cycle should be documented within the procedure (e.g., reviewed 01/01/2025 or updated 01/01/2025.) Currently, the documents are missing this information so it isn't evident that they have ever been reviewed or updated. In light of the NIST 2.0 release, now would be an appropriate time for a thorough review.
- Areas for continued improvement include developing the following policies or standards: *Data & Media Management, Encryption Standards, Secure Configuration Management, Vulnerability Management, Audit Log Management, Penetration Testing, Network Infrastructure Management*. CESO can provide sample language for these policies.
- A model for organizing a formalized governance document standard may look as follows:
 - *Board Policy - Cybersecurity*: The Board directs the Superintendent, or their designee, to ensure the security of the district information and technology systems. This Board-level policy should establish the School Board's expectation of the Superintendent and District staff to create and maintain secure systems through a cybersecurity program.
 - *Administrative Regulation - Cybersecurity*: The Superintendent directs the Chief Information Officer or Technology Services Division to:
 - operate a cybersecurity program utilizing the NIST or CIS framework in order to address assessed risks to the organization.
 - partner with other agencies that support secure school operations (i.e. CISA, GaDOE Focus, GTA, etc).

- conduct an annual cybersecurity audit, and to report the results of the audit to the Superintendent.
 - *Internal Security Policies*: Policies that address all NIST or CIS governance standards, including: Data management, media management, data and media sanitation, secure device configurations, encryption standards, malware defense, vulnerability monitoring, patch management, audit log management, penetration testing, cybersecurity auditing, account & credential management, network infrastructure management, cybersecurity awareness training, backup and recovery, incident response planning, and business continuity planning.
 - *Procedures*: Procedure formalization is organization dependent. DCSD schools have a number of procedures already. Procedural documentation is recommended when it is useful to the ongoing practice, and/or there is a need to coordinate with parties outside of the technology department (e.g. HR/IT coordinating account creations/lockouts/etc).
 - *Standards & Guidelines*: Standards and guidelines are most helpful in defining any scope or criteria that needs to be explained to the organization including authentication assurance levels, system risk tier definitions, service level agreements, etc.
- DCSD already employs senior technology staff who possess extensive expertise and a strong desire to advance these initiatives. These programs, which may affect user experience or systems development, require consistent attention and develop gradually. The objective is to establish regular, monitored, continuous improvement with intentional feedback loops that communicate and document the cybersecurity program's growing maturity. Many expected security practices, such as vulnerability detection and patch management, are already in place but have not yet been formalized into a documented cybersecurity program through security policy, procedure, guideline, and standards documentation.
- Leadership requires clear and concise communication regarding cybersecurity initiatives to make informed decisions. Using a solution such as *SecurityStudio* may help with this communication. Also, finding the right cybersecurity audit firm can also be helpful. When interviewing firms, ensure they understand the intended audience of their reports and how these reports will contribute to the district's cybersecurity program over the next 3-5 years.

Data Classification & Data Loss Prevention:

- DCSD recognizes that Data Loss Prevention (DLP) is a critical need. While initial steps are being taken with assessments and roadmap development, the District is still in the early stages of implementing comprehensive DLP policies. There is an understanding of the importance of DLP for data security and compliance, as well as the challenges involved in its implementation across a large educational institution within the technology leadership staff. This concern is largely held by the Director of Information and Network Security and

the Executive Director for Apps and Data Services. The team recognizes that DLP is a shared responsibility.

- The District is in the early stages of their DLP journey and has begun mapping out data systems and data classification tools. The Department is currently working on its initial assessment and aims to build a greater understanding of the District's current reality.
- Lack of Formalized Policies: While basic data sharing policies exist (like automatic expiration after 60 days), the Executive Director of Apps and Data Services acknowledged that they are in need of having automatic policies in place that apply to data classification labels to help effectively manage data. He expressed eagerness to reach this point.
- Interviews revealed that the District requires updated DLP tools to detect and alert for potential data leaks. Staff expressed interest in evaluating tools that could quarantine and freeze suspicious activity. While the team has identified potential tools, they have not yet formalized a plan or funding request.
- DLP initiatives are inherently complex as they span multiple technology systems (network drive, cloud drive, email, etc). They also require extensive user training, monitoring, and follow-up support. In terms of implementation success, the primary factor here will likely be related to how training and procedures successfully change the human behaviors required to perform routine classification on their files and email.
- While the network security team would likely handle incident response in case of a data breach, it was noted that DLP and incident response are closely tied. Tools deployed to support DLP would also help with investigating incidents.

Plan For Action

Do Now

Information & Technology Security:

1. Ensure that Board policy, administrative regulations, and security policies are all aligned by reviewing and updating current cybersecurity documentation.
2. Review existing practices to begin formalizing department procedures (SOPs).
3. Begin evaluating building network closets in order to identify future cost barriers for pending upgrades that are expected within the next five years.

Cybersecurity:

1. Evaluate potential System Information Event Monitoring (SIEM) solutions and costs for inclusion in the Technology Plan.
2. Before launching internal phishing campaigns as part of *KnowB4* training, ensure that District leadership comprehends the scope and purpose of the initiative. Determine and carry out the required steps to implement these campaigns.
3. Develop a plan and timeline for obsoleting older *Windows 7/8* machines.

Enterprise Telecommunications:

1. Create a clear policy on cell phone allocations and audit current cell phone assignments to align with the new policy.

Data Classification & Data Loss Prevention:

1. Continue the initial assessment to build a greater understanding of the District's current data systems and potential classification tools (*Google/Microsoft* Tools).

Policies and Practice (General):

1. Initiate a technology planning process that aligns with the District's strategic plan. Ideally this plan will address multi-year costs related to standard operations, cybersecurity development, and technology support aligned to MIRACLES.
2. Review the existing Business Continuity Plan and Incident Response Plan (originated in 2021) and document the review cycle.

Communication with Superintendent (Cybersecurity):

1. Develop a strategy to provide the Superintendent with clear and concise updates on the progress of cybersecurity initiatives.

Do Soon

Information & Technology Security:

1. Begin creating additional cybersecurity policies or standards, including: Data & Media Management, Encryption Standards, Secure Configuration Management, Vulnerability Management, Audit Log Management, Penetration Testing, Network Infrastructure Management.
2. Thoroughly review existing security policies in light of the NIST 2.0 release.

Data Center & Cloud Services:

1. Continue establishing governance documents for cloud and data center services.

2. Focus policy development on guidelines and standards for implementing secure cloud and data center services (secure server images, protocol configurations, and services on/off).

Technology Planning & Budget:

1. Begin the process of identifying all areas that require multi-year budgeting. These areas may include student and staff devices, network infrastructure, classroom displays, security systems, and servers.
2. Integrate the Senior Manager of Network Operations' Cable Management Plan into the budget process.

Cybersecurity:

1. Adopt and begin implementing a SIEM system. Primary target for SIEM monitoring is IdP (*Azure*) authentications and other primary systems (Finance/HR ERP, Student Information, *Microsoft & Google* environments.)
2. Implement monthly internal phishing campaigns as they are most effective when it's normalized, routine, and focuses on positive reinforcement.
3. Establish a timeline and strategy for phasing out outdated Windows 7/8 devices.

Data Classification & Data Loss Prevention:

1. Further evaluate tools available in the market for DLP to identify potential data leaks and enable alert configuration.
2. Begin exploring funding requests for necessary DLP tools.
3. Develop leadership knowledge around what DLP is, what data classification practices might look like, and a timeline for implementing changes.

Physical Security:

1. Continue to develop SOPs for physical security systems to establish consistent practices throughout the District.

Do Later

Date Center & Cloud Services:

1. Move forward with the Disaster Recovery & Business Continuity planning project (RFP and consultant engagement recommended). This work has already been identified as needed and can move forward sooner as budget and team capacity exists to implement.

Technology Planning & Budget:

1. Develop budget projections for equipment replacements based on identified lifecycles (e.g., network switches, wireless access points on an eight-year staggered timeframe, classroom displays on a 10-12 year cycle).

Cybersecurity:

1. Fully formalize the documented cybersecurity program through the creation and implementation of security policies, procedures, guidelines, and standards.
2. Engage with potential cybersecurity audit firms, ensuring they understand the report audience and how their reports can contribute to the long-term development of the cybersecurity program (3-5 year horizon).
3. Ensure that the District leadership team has a basic understanding of the cybersecurity program.

Data Classification & Data Loss Prevention:

1. Implement automatic policies for data classification labels to effectively manage data.
2. Deploy and configure chosen DLP tools across relevant technology systems (network drives, cloud drives, email, etc.).
3. Develop and implement comprehensive user training on data classification and DLP procedures.
4. Establish monitoring and follow-up support processes for the implemented DLP initiatives.
5. Formalize the integration between DLP tools and the incident response process.

Section V

Appendix

- [Exhibit A:](#) Comprehensive Assessment Project Team Members
- [Exhibit B:](#) Glossary of Terms & Acronyms
- [Exhibit C:](#) Finance & Operations Departments Interview Teams
- [Exhibit D:](#) Department of Facilities Interview Team
- [Exhibit E:](#) Department of School Nutrition Services Interview Team
- [Exhibit F:](#) Department of Transportation & Fleet Services Interview Team
- [Exhibit G:](#) Division of Information and Instructional Technology Interview Team
- [Exhibit H:](#) Finance & Operations Departments - Documents & Resource
- [Exhibit I:](#) DCSD Division of Operations: Vacant Positions (11.19.2024)
- [Exhibit J:](#) DCSD 7-Region Map (2021-22 School Year)

Exhibit A: Project Team Members

DeKalb County School District
Operations & Information and Instructional Technology Divisions
Comprehensive Assessment
Team Members
(November 2024 - May 2025)

Center for Effective School Operations (CESO) Project Team:

DeeDee Kahring, Senior Strategy Consultant & DCSD Project Manager
Dr. Bob McDowell, Sr. VP of Leadership & Organizational Health & DCSD Project Executive
Mike Archer, Director of Transportation Consulting
Margo Bauck, Finance Strategist
Rich Enga, Transportation Account Representative
Kim Franta, Nutrition Services Consultant
Eric Hamilton, Facilities Consultant
John Perry, Sr. Technology Consultant
Tom Platt, Senior Advisor
Sara Riegel, HR/Employee Experience Consultant
Michelle Sagedahl, Nutrition Services Consultant

DeKalb County School District Leadership Team:

Dr. Devon Horton, Superintendent
Elijah Palmer, Chief of Staff
Joel Thibodeaux, Director Internal Audit & Compliance & Project Manager
Keith Ball, Executive Director of Capital Improvements and Facilities
Dr. Kermit Belcher, Deputy Chief Technical Officer
Gwen Brame, Manager III, Business and Operations
Antwyn Brown, Deputy Chief Operations Officer
Dr. Kyia Clark, Executive Director Information and Innovation
Tasha Davis Mills, Chief Human Resources Officer
Erick Hofstetter, Chief Operations Officer
Glenn Melendez, Executive Director Enterprise App & Depp Services
Emma Oakley, Director IT Support Services
Byron Schueneman, Chief Financial Officer
Raymond Stanley, Executive Director of Transportation and Fleet Operations
Natalie Terrell, Manager III, Project Management Office
Dr. Connie Walker, Executive Director of School Nutrition Services

Exhibit B: Glossary of Terms & Acronyms

- **DCSD** - DeKalb County School District (the District)
- **CESO** - Center for Effective School Operations
- **CEP** - Community Eligibility Provision: allows eligible students to receive meals at no charge
- **CIP** - Capital Improvement Plan - annual project list that addresses needs of
- **CIS** - Center for Internet Security
- **DLP** - Data Loss Protection
- **E-SPLOST** - Education-Special Purpose Local Option Sales Tax. The E-SPLOST program in Georgia funds capital projects for school systems such as: new facilities, Renovations, technology, security, buses, debt reduction, land, equipment, and library materials.
- **GaDOE** - Georgia Department of Education
- **GIS** - Geographic Information System used in the Transportation Department to determine efficient and safe bus routes.
- **GPS** - Global Positioning System
- **HR** - Human Resources
- **MDM** - Mobile Device Management
- **MIRACLE goals** - The MIRACLES Framework is an acronym for an evidence-based approach to education quality improvement that enables districts to improve their academic and operational performance and ultimately transform their student outcomes. -
- **MPLH** - Meals Per Labor Hour
- **MPOE** - Minimum Point of Entry
- **MUNIS** - an integrated Enterprise Resource Planning (ERP) solution used by public sector organizations, including school districts, for managing finance, human resources, and other operational processes.
- **PMI** - Project Management Institute
- **PMO** - Project Management Office
- **PO** - Purchase Order
- **PoE** - Power over Ethernet
- **PPM** - Program Procedures Manual
- **PrimeroEdge** - school nutrition software that streamlines operations
- **RFP** - Request for Proposal
- **ROI** - Return on Investment
- **RTA Software** - Ron Turley Associates fleet management software
- **SAP** - Student Assignment Process: planning process that uses extensive data analysis to realign programs and building boundaries every five years
- **SIEM** - System Information Event Monitoring
- **SIP** - Session Initiation Protocol
- **SOP** - Standard Operating Procedures
- **TA** - Talent Acquisition
- **TAMS** - Talent Acquisition Management System
- **TCO** - Total Cost of Ownership
- **VEU** - Vehicle Equivalent Unit measurement
- **WMS** - Warehouse Management System

Exhibit C: Finance & Operations Departments Interview Teams

CESO Finance and Operations:

- DeeDee Kahring, Senior Strategy Consultant & DCSD Project Manager
- Margo Bauck, Finance Strategist
- Eric Hamilton, Facilities Consultant

DCSD Finance:

- Byron Schueneman, Chief Financial Officer
- Lauren Scott, Deputy Chief Financial Officer
- Carla Smith, Executive Director of Vendor Services and Payables
- Regina Frazier-Thomas, Director of Budget
- Jonathan Lance McConkey, Comptroller
- Eric Cannady, AP Manager III
- Weyman “Fred” Christopher, Procurement Manager II

DCSD – E-SPLOST:

- Erick Hofstetter, Chief Operating Officer
- Antwyn Brown, Deputy Chief Operations Office
- Keith Ball, Executive Director Capital Improvements and Maintenance
- Hans Williams, Director of Planning/SPLOST Programming
- Janice Pence, Manager II Capital Projects Outlay

Exhibit D: Department of Facilities Interview Team

CESO Finance and Operations:

- DeeDee Kahring, Senior Strategy Consultant & DCSD Project Manager
- Margo Bauck, Finance Strategist
- Eric Hamilton, Facilities Consultant

DCSD – E-SPLOST and Operations:

- Erick Hofstetter, Chief Operating Officer
- Antwyn Brown, Deputy Chief Operations Office
- Keith Ball, Executive Director Capital Improvements and Maintenance
- Bobby Montcrief, Director of Facility Services
- Keith Singleton, Director of Business Services
- Hans Williams, Director of Planning/SPLOST Programming
- Shante Lemon, Senior Project Manager
- Calvin Thorton, Supply Chain Manager
- Kea Arthur, Office Specialist to Mr. Hofstetter

Revised Draft 6/18/25

Exhibit E: Department of School Nutrition Services Interview Team

CESO Nutrition Services:

- DeeDee Kahring, Senior Strategy Consultant & DCSD Project Manager
- Kim Franta, Nutrition Services Consultant
- Michelle Sagedahl, Nutrition Services Consultant

DCSD –School Nutrition Services Department:

- Dr. Connie Walker, Executive Director of School Nutrition Services
- Janet Stone, Assistant Director of School Nutrition Services
- Earlvon Corbin, Business Manager III
- Charlene George, Technology and Special Projects Manager
- Jacqueline Bailey, Training Supervisor
- Tahira Davis, Compliance Supervisor
- Tia Gore, Compliance Supervisor
- Tammy Harkness, Compliance Supervisor
- Twona Price, Compliance Supervisor
- Krystal Rice, Compliance Supervisor
- Angela Jones, Data Accounting Technician
- Shayna Bishop, Principal, R E McNair Elementary School
- Shawnt'a Franklin, Assistant Principal, Martin Luther King Jr. High School
- Sandra Carr, Manager, Huntley Hills Elementary School
- Lynette Kendrick, Manager, R E McNair Elementary School
- Cynthia Maldon, Manager, Tucker Middle School
- Sonya Nelson, Counselor, Huntley Hills Elementary School
- Administrator, Tucker Middle School

Exhibit F: Department of Transportation & Fleet Services Interview Team

CESO Transportation:

- **DeeDee Kahring**, Senior Strategy Consultant & DCSD Project Manager
- **Mike Archer**, Director of Transportation Consulting

DCSD Department of Transportation & Fleet Services:

- **Raymond Stanley**, Executive Director, Transportation & Fleet Services
- **Bernardo Brown**, Director of Transportation
- **Chadra Carter**, Assistant Director of Fleet Services
- **Kelvin Curtiss**, Fleet Operations Manager
- **Alex Riley**, Manager of Transportation
- **Samuel Butler III**, Interim Fleet Operations Supervisor
- **Carol Collier**, Supervisor of Routing
- **Natalie Knowles**, Supervisor of Safety & Training
- **Joseph Nichols**, Fleet Operations Supervisor
- **Cynette Payne**, Computer & Database Specialist
- **Carmen Walker**, Finance Specialist
- **Raymond Griffin**, Lead Mechanic
- **Maurice Masutier**, Lead Mechanic

Revised

Exhibit G: Information and Instructional Technology Interview Team

CESO Technology Operations:

- DeeDee Kahring, Senior Strategy Consultant & DCSD Project Manager
- John Perry, Senior Technology Consultant

DCSD – Technology Operations Division:

- Kermit Belcher, Chief Information Officer
- Glenn Melendez, Executive Director of Applications and Data Governance
- Kaia Clark, Executive Director for Information and Innovation
- Eric Logan, Director of Information and Network Security
- Emma Oakley, Director of Technical & Support Services
- Gwen Bream, Manager III of IT Business Operations
- Cedric Brown, Manager III of Network Services
- Perry Hendris, Manager III of Physical Security
- Yolanda Lowry, Manager III Technology Asset Manager
- Jeff Miller, Manager III Asset and End User Computing
- Jamal Northington, Manager III Data Center & Cloud Services
- Troy Palmer, Manager III of Student Information
- Herman Parker, Manager III of Technical Support Services
- Joseph Swing, Manager III of Enterprise Telecommunications
- Natalie Terrell, Manager III of the Project Management Office and Team
- Terry Webb, Manager III of Instructional Technology

Exhibit H: Finance & Operations Departments - Documents & Resources

The following documents are included as PDFs in Exhibit H:

- **DCSD Policies Related to Finance & Operations**
 - Board Policy DJE: Purchasing
 - Board Policy DJE-R(1): Purchasing
 - Board Policy DJ: Expenditure of Funds

- **Purchasing/Procurement Policies & Procedures from Comparable Districts**
 - Clayton County Schools Purchasing Policy
 - Cobb County Schools Purchasing Policy
 - Cobb County Schools Purchasing Procedures (p. 1-20)
 - Forsyth County Schools Purchasing Policy
 - Fulton County Schools Purchasing Policy
 - Gwinnett County Schools Purchasing Policy
 - Gwinnett County Schools Purchasing Procedures



Board Policy DJE: Purchasing

Status: ADOPTED

Original Adopted Date: 01/12/2004 | **Last Revised Date:** 10/18/2021 | **Last Reviewed Date:** 10/18/2021

Purchasing

The DeKalb County Board of Education (“Board”) is committed to the establishment of policies for sound fiscal management of the DeKalb County School District (“District”) in the area of procurement.

I. BOARD GOVERNANCE

Authority to commit or spend District funds for the purchase of goods and services is vested in the Board of Education and is to be administered and managed by the Superintendent and staff in accordance with the policies, rules and regulations of the Board, the District, the Board-approved budget, the State Board of Education, and in compliance with federal and state laws.

District funds shall not be committed or spent unless there is an approved budget item and available funds in the appropriate account. All purchases for which there are not budgeted funds require the prior approval of the Board. Deficit spending is not permitted.

Staff members involved in the purchasing and procurement processes shall comply with all applicable federal, state and local laws, as well as the policies, rules, and regulations of the DeKalb County Board of Education, the State Board of Education and the Georgia Professional Standards Commission as applicable.

The Finance Division through the Purchasing Department shall be responsible for the day-to-day management of procurement and shall produce and issue purchase orders for both capital and non-capital projects. The Finance and Operations Divisions shall work cooperatively to facilitate the District’s purchasing and procurement processes.

II. DEFINITIONS

A. As used in this policy, the term “capital project(s)” means:

1. The building, designing, altering, repairing, improving, replacing, retrofitting or demolishing of any public school structure, educational or administrative facility in the DeKalb County School District;
2. The acquisition of school sites, buildings, or other fixed assets, whether by purchase or lease purchase; or
3. The initial equipping and furnishing of educational facilities included under a capital contract.

The term “capital project(s)” does not include the routine operation, repair, or maintenance of existing structures, buildings, fixed assets, or real property.

B. The term “professional services” means services that require:

1. A degree in a particular professional field;
2. A license from a state oversight board or similar authority; or
3. The exercise of specialized skill, knowledge, creativity, or technical abilities.

Professional services may also include services rendered by an individual licensed under Title 43 of the Official Code of Georgia who is in good standing and that individual is performing that service.

Examples of professional services include: accountants, actuaries, appraisers, architects, attorneys,

brokerage firms, business consultants, educational consultants, engineers, financial advisors, land surveyors, landscape architects, mental health professionals, occupational therapists, physical therapists, physicians, program managers, psychologists, public relations professionals, recruiters, researchers, real estate appraisers, real estate brokers, speech-language pathologists, software engineers, translators, web designers, and members of state-regulated professions.

Professional services typically are better suited to a qualitative or subjective method of assessment, rather than a rigidly quantitative or objective method of assessment.

C. The term "Superintendent" means the Superintendent of the District, including the Superintendent's authorized designees.

III. COMPETITIVE SELECTION

Competition among those seeking to do business with the District helps ensure that the District receives the best price for the goods and services it needs. The Superintendent shall adopt regulations consistent with this policy, further detailing the competitive selection of vendors.

The Board reserves the right to reject any or all bids or proposals submitted in response to any solicitation and to cancel and/or re-solicit any solicitation. The Board also reserves the right but shall not be obligated to waive technicalities and informalities for all bids or proposals submitted in response to any solicitation.

A. Competitive Selection Process

1. **Dissemination of Solicitation; Advertisement** – Solicitations for services or goods shall be advertised in the official legal organ of the county, on the District's procurement services website, the Georgia Procurement Registry and notification sent to a list of prospective vendors. Any other methods of advertisement including other appropriate websites identified as likely to result in additional competition may be used in addition to required advertisements, at the discretion of the Superintendent.
2. **Receipt of Responses** – Solicitation responses must be submitted in a sealed envelope or package and mailed/delivered to the address shown on the solicitation document.
3. **Response Opening** - Solicitation responses shall be opened publicly in the manner and on the date and at the time and place designated in the solicitation.
4. **Response Evaluation** – Competitive solicitations shall be evaluated based on the requirements set forth in the solicitation.
5. **Proprietary Information** - Information submitted by a respondent that is specifically marked "proprietary" shall not be disclosed by the District to other persons without prior written notification to the respondent. The District shall comply with any applicable law regarding disclosure, including the Georgia Open Records Act, O.C.G.A. §50-18-70, et seq.

In the event the District receives less than three (3) responses, a market analysis should be performed. However, there may be rare circumstances in which a market analysis is not feasible. In such instances, timely notification to all Board members is required in advance of the item being presented for Board approval.

B. Competitive Selection of Vendors for Capital Projects

1. Purchases or contracts with a total estimated cost of \$5,000.00 or less shall be made at

the discretion of the District.

2. Purchases or contracts with a total estimated cost of \$5,000.01 to \$99,999.99 shall be made on the basis of at least two written quotations and selected based on objective criteria of performance and ability to execute.

3. Purchases or contracts with a total estimated cost of \$100,000.00 or more shall be awarded through a written competitive sealed bid process to the lowest responsible, responsive bidder or through a competitive request for proposal process where the offer deemed to be most advantageous to the District may be selected. The decision whether or not to use a competitive sealed bid or a competitive request for proposal shall be made by the Superintendent or the Superintendent's authorized designee, based on sound business judgment and the best interest of the District. Bid requests, requests for proposals or purchases must not be divided into smaller units in order to circumvent the competitive selection requirements.

4. Contracts for professional services, as defined above, shall be awarded in the manner best suited to allow a full assessment of professional abilities and other relevant criteria, while also ensuring an open and fair selection process that engenders public confidence. Competitive bidding seldom will be the best method for selecting professional services.

5. Proof of appropriate insurance shall be required for all bids or proposals on capital projects with a total estimated cost of \$100,000.00 or more, and may be required for bids or proposals with a total estimated cost of less than \$100,000.00 at the discretion of the Superintendent or the Superintendent's authorized designee. Payment, performance, and bid bonds in the amount of 5% of the bid or proposal shall be required for all capital contracts of \$100,000.00 or more, and may be required for bids or proposals with a total estimated cost of less than \$100,000.00 at the discretion of the Superintendent or the Superintendent's authorized designee.

6. Bidders on capital projects of \$50,000.00 or more are required to provide a list of subcontractors whose contracts will exceed five percent of the general contract. At the discretion of the Superintendent or the Superintendent's authorized designee, such subcontractor list may also be required from bidders on capital projects of less than \$50,000.00 and where subcontractor contracts will not exceed five percent of the general contract. Bid requests must not be divided into smaller units in order to circumvent the competitive selection requirements.

7. To the extent applicable, all capital project solicitations shall meet the requirements of Chapter 91 of Title 36 of the Georgia Code, the Georgia Department of Education Rules and Regulations applicable to capital projects, and any other applicable state and federal law.

8. Prior to issuing a request for proposal on a capital project, the Superintendent or the Superintendent's authorized designee shall obtain a letter from legal counsel stating that the proposal has been reviewed and meets the criteria required by O.C.G.A. §§ 36-91-20 and 36-91-21.

C. Competitive Selection of Vendors for Non-Capital Projects

1. Purchases or contracts with a total estimated cost of \$5,000.00 or less shall be made at the discretion of the District.

2. Purchases or contracts with a total estimated cost of \$5,000.01 to \$99,999.99 shall be made on the basis of at least two written quotations and selected based on objective criteria of performance and ability to execute.

3. Purchases or contracts with a total estimated cost of \$100,000.00 or more shall be

awarded through a written competitive sealed bid process to the lowest responsible, responsive bidder, or through a competitive request for proposal process where the offer deemed to be the most advantageous to the District may be selected. The decision whether to use a competitive sealed bid or a competitive request for proposal shall be made by the Superintendent or the Superintendent's authorized designee, based on sound business judgment and the best interest of the District. Purchases shall not be divided into smaller units or lesser amounts in order to circumvent the competitive selection requirements.

4. Contracts for professional services, as defined above, shall be awarded in the manner best suited to allow a full assessment of professional abilities and other relevant criteria, while also ensuring an open and fair selection process that engenders public confidence. Competitive bidding seldom will be the best method for selecting professional services.

D. Exceptions to Competitive Selection

1. All exceptions to competitive selection must be properly documented in the project and/or contract file in a manner prescribed by the Superintendent or the Superintendent's authorized designee.

2. These exceptions allow staff to select vendors without employing the competitive selection methods described above. Unless otherwise stated, however, approval at the appropriate level of authority is still required.

3. Use of the competitive selection measures described above is not required when:

a. **Emergency Purchases.** The purchase or contract is necessitated by an emergency, defined as any situation that threatens to jeopardize the health, welfare or safety of students, staff, the District or the public or the loss of an essential District service, including but not limited to interruption of the instructional program. Such emergency purchases shall be made with as much competition as is practicable under the circumstances. Emergency purchases of \$25,000.00 or more require prior approval by the Superintendent or the Superintendent's authorized designee and timely notification to all Board members. Not later than the Board's next regular meeting following the emergency purchase, any contract or purchase awarded in an emergency situation shall be ratified by the Board and the Board shall receive a written report describing the nature of the emergency, a listing of goods and services procured under the contract or purchase, the selection process for the provider, the name of the provider and the amount of the purchase, all of which shall be described in the Board minutes.

b. **Sole Source.** The required goods or services can only be obtained from one source in the marketplace. Such goods or services will usually be of a unique nature and have performance characteristics that can only be obtained from that source. Written documentation of such determination, in a manner prescribed by the Superintendent or the Superintendent's authorized designee, shall be maintained in the project and/or contract files. For capital improvement projects, specified equipment and materials of a proprietary nature will be identified and submitted to the State DOE Receiving State Capital Outlay Funds 160-5-4-.16(a)(8).

c. **Single Source.** The required goods or services can only be obtained from one source among others in a competitive marketplace for a substantial reason such as compatibility or standardization provided a reasonably diligent search has been made for other vendors or other appropriate information has been obtained to determine a vendor's single source status. Written documentation of such determination, in a manner prescribed by the Superintendent or the Superintendent's authorized

designee, shall be maintained in the project and/or contract files. For capital improvement projects, specified equipment and materials of a proprietary nature will be identified and submitted to the State DOE Receiving State Capital Outlay Funds 160-5-4-.16(a)(8).

d. The purchase is made through contracts formally solicited and obtained by the State of Georgia, or any other political subdivision of the State of Georgia, the federal government, or some other governmental agency. The Purchasing Department shall be authorized to make purchases through inter-governmental and educational cooperatives, alliances and consortiums to achieve cost savings and administrative efficiencies based on economies of scale.

e. The expenditure is for personal employment services rendered by full-time or part-time employees who are under the control of the Board and are paid wages for their service. Employment of personnel is handled by the Department of Human Capital Management.

f. The expenditure is for special education services or other student services required by state or federal law.

g. The purchase is for instructional materials or programs selected in accordance with Board Policy IFA or selected by qualified professional personnel, based on sound pedagogical judgment and the best interest of the District, and acting at the direction of the Superintendent or the Superintendent's authorized designee. The types of instructional materials and programs covered by this exception include:

(1) Instructional programs and textbooks;

(2) Supplemental materials needed for instruction in the school such as films, slides, videotapes, CDs, DVDs, educational kits, posters, displays, games, computer software, software licenses, subscriptions, newspapers, periodicals, library books, reference materials, or other instructional material purchased from the publisher, distributor, or agent.

(3) Test, test preparation, and test scoring services of a standardized examination purchased from the publisher or licensed agent;

(4) Membership in various educational or related organizations, agencies or services providing direct benefits to the District;

(5) Instructional material listed in the K-12 Curriculum Supplemental Materials Catalog;

(6) Professional training programs for staff, the selection of which is left to the professional judgment of the administrator responsible for the professional development of the personnel attending or participating; and

(7) Mandated testing, instructional programs, and instructional materials approved by the Georgia Department of Education (GaDOE). A copy of the GaDOE approval shall be submitted with the request to purchase these materials\items.

h. The purchase is a continuation of an existing purchase agreement, bid, request for proposal, time and material contract, rental, lease, or purchase order duly authorized by the Board or its agent.

i. The expenditure is for maintenance services from the original vendor or an authorized agent of the original vendor and these services cannot be competitively

bid.

j. The expenditure is for additional orders of like equipment, materials, supplies, services, rentals, or leases previously approved, provided the additional order is at the same or a lower price, or the original contract included an automatic price adjustment based on the Consumer Price Index or the Producer Price Index for commodities or services.

k. The contract is for services to be provided by a government agency.

l. The expenditure is for Workers Compensation and Risk Management insurance claims made under existing legal policy or contract requirements.

IV. REQUIRED LEVELS OF APPROVAL

The appropriate level of approval is required for all contracts and purchases, including those that fit within an exception to the competitive selection measures. All contracts and purchases for capital and non-capital projects require approval at the following levels before obligating the District:

A. Independent Contractor Agreements

1. Independent contractor agreements with a total cost of \$49,999.99 or less require the prior approval of the Superintendent or the Superintendent's authorized designee, with the exception of certain local school purchases as set forth in Policy DJEG or other exceptions set forth explicitly in Board Policy of Administrative Regulations.
2. Independent contractor agreements with a total cost of \$50,000.00 or more require Board approval based on the recommendation of the Superintendent.

B. Levels of Approval for Capital Projects

1. Purchases and contracts with a total cost of \$99,999.99 or less require the prior approval of the Superintendent or the Superintendent's authorized designee, with the exception of certain local school purchases as set forth in Policy DJEG or other exceptions set forth explicitly in Board Policy or Administrative Regulations.
2. Purchases and contracts with a total cost of \$100,000.00 or more require Board approval based on the recommendation of the Superintendent.

C. Levels of Approval for Non-Capital Projects

1. Purchases and contracts, excluding independent contractor agreements, with a total cost of \$99,999.99 or less require the prior approval of the Superintendent or the Superintendent's authorized designee, with the exception of certain local school purchases as set forth in Policy DJEG or other exceptions set forth explicitly in Board Policy or Administrative Regulations.
2. Purchases and contracts, excluding independent contractor agreements, with a total cost of \$100,000.00 or more require Board approval based on the recommendation of the Superintendent.

D. Additional Provisions

1. When a vendor has separate contracts or purchases with the District, Board notification via the vendor spend report is required when the total of all contracts and purchases with that vendor would exceed \$100,000.00 in any fiscal year.
2. Contracts that are renewed or increased pursuant to change order, contract amendment, or revised purchase order require approval at the appropriate level based on the new contract total.
3. Purchases shall not be divided into smaller units or lesser amounts in order to circumvent the required level of approval.
4. All purchases and contracts under \$100,000.00 shall be reported to the Board monthly for information only, reflecting vendor, goods or services purchased, amount of purchase, and the name(s) of staff member(s) who signed/provided the approval.
5. The following types of purchases are strictly prohibited:
 - a. Goods or services not directly related to job responsibilities or other official District business (i.e., personal purchases);
 - b. Alcoholic beverages or products; and
 - c. Tobacco products.

E. Special Education and other Legally Mandated Student Services

Expenditures for student services that are required by state or federal law will not require the use of competitive selection measures or the prior approval of the Board, provided there are budgeted funds available and the expenditures are included in the report of expenditures sent to the Board monthly for information only.

F. Local School Purchases

Local schools are authorized to purchase goods and services subject to monetary limits and other restrictions imposed by this Board Policy DJE and Board Policy DJEG and the Superintendent.

V. PROVISIONS APPLICABLE TO ALL CONTRACTS AND PURCHASES

A. Equal Opportunity

All vendors and contractors shall have an equal opportunity to participate in the District's purchasing and procurement processes without regard to race, color, sex, age, religion, disability national origin, ethnicity, veteran status, sexual orientation, gender identity or expression, genetic information or any other status or basis protected by applicable laws.

All vendors and contractors doing business with the District shall provide all persons with equal opportunity without regard to race, color, sex, age, religion, disability, national origin, ethnicity, veteran status, sexual orientation, gender identity or expression, genetic information or any other status or basis protected by applicable laws.

All procurements shall be awarded with the goal of upholding inclusive practices in the District's competitive solicitation process. The Superintendent is authorized to develop administrative regulations necessary to carry out the goals of inclusive and diverse practices among District vendors.

B. Purchasing Card

A purchasing card system shall be administered by the Purchasing Department and Purchasing Manager or designee. The system shall allow purchases to be made by persons outside of the Purchasing Department who have been approved to use the purchasing card. Specific limits as to dollar amounts per purchase, dollar amount per month and types of products or services to be purchased shall be followed as outlined in the Purchasing Card Guidelines and other policies and procedures of the District's Purchasing Card Program.

Purchasing cards may be issued to elected or appointed members of the Board of Education, department heads, executive level staff, or school/division heads. The card shall be used solely for the purpose of purchasing items and services that are directly related to the duties of the DeKalb County Board of Education and the DeKalb County School District, in accordance with Regulation DJE-R(1) and in accordance with the policies and procedures of the District's Purchasing Card Program.

Prior to the use of the purchasing card, the authorized user shall sign and accept an agreement with DeKalb County School District that they will use such cards only in accordance with the policies and procedures of the DeKalb County School District and applicable guidelines. There shall be a per transaction limit of \$5,000.00 on the purchasing cards.

The following types of purchases are strictly prohibited:

1. Personal purchases or cash withdrawals.
2. Cash advances.
3. Transactions beyond the daily expenditure limit as determined by the Purchasing Department and the monthly expenditure limit of \$20,000.00.
4. "Multiple swipes" to enable a single purchase over \$5,000.00 or to evade the per-transaction limit of \$5,000.00. Multiple swipes are defined as multiple purchases made by the same cardholder, on the same day, from the same vendor, to enable a single purchase. The invoice total must correspond to the transaction amount total for each vendor.
5. Equipment purchases exceeding \$999.99. The purchasing card cannot be used to purchase electronic tablets, computer hardware, smart watches smart phones, or similar equipment.
6. Sales tax. The DeKalb County Board of Education's tax-exempt number is printed on the front of each purchasing card. In the event sales tax is charged in error, a reimbursement check must be submitted immediately by the cardholder.
7. Gift cards, stored value cards, calling cards and similar products.
8. Furniture purchases.
9. Food or gratuity purchase, with the exception of purchases set forth in Regulation DJE-R-(1).
10. Data plans, software, or applications for non-District issued devices.
11. No professional services.

The Purchasing Manager or designee shall periodically, but not less than annually, conduct audits of the purchasing card program to ensure that purchases made are related to the duties of the DeKalb County Board of Education and the DeKalb County School District.

Misuse of a purchasing card constitutes a serious breach of the public trust. Cardholders, program users, or others who knowingly, or through willful neglect, fail to comply with the purchasing card program may be subjected to suspension or termination of account privileges or other disciplinary action, up to and including termination of employment and other civil or criminal penalties to the fullest extent of the law.

C. Requests for Information

Requests for information may be issued by the Purchasing Department to acquire information from market participants before soliciting bids or proposals. Contracts shall not be awarded based on Requests for Information. Requests for Information, however, may become the basis for subsequent Request for Proposals.

D. Requests for Qualifications

Requests for Qualifications may be issued by the Purchasing Department as needed to establish a pool of qualified suppliers of goods and services.

E. Multi-Year Contracts

Multi-year contracts with vendors are permissible, provided they comply with O.C.G.A. § 20-2-506 and any other applicable state and federal laws as well as Board policies and any restrictions imposed by the Superintendent. Any renewal or extension of a multi-year agreement must have the approval of the Board if the cost of the renewal or extension will be \$100,000.00 or more.

F. Purchasing Ethics

All employees shall purchase and procure goods and services and maintain vendor/supplier relationships in an ethical manner and shall act as responsible stewards of public funds. Employees shall not use any information gained in the performance of their duties to advance their own or any other person's financial or private interests. The Superintendent provides the expectations listed below with the full knowledge that the good judgment of each employee is essential, and that no list of rules or guidelines can provide direction for all circumstances that arise. Employees who have questions about a potential ethical concern, or any employee who observes or has reason to believe that Board policy has been violated or that unlawful conduct has occurred or is occurring in connection with the procurement of goods or services for the District, must report the situation or concern to the immediate supervisor, the Chief Financial Officer, the Chief Legal Officer and/or the Superintendent. Employees who violate procurement ethics expectations shall be subject to disciplinary action, up to and including termination, and may be subject to civil and criminal penalties as applicable, to the fullest extent of the law.

Expectations of employees involved in the purchasing and procurement processes are as follows:

1. District employees shall not solicit or knowingly accept any gift, gratuity, loan, special discount, entertainment, transportation, lodging, meals, favor, promise of future employment, or any economic opportunity, except those of value less than \$100.00 from any individual, entity, vendor or supplier that is interested directly or indirectly in business dealings or is doing business with the District, except in the following situations:
 - Meetings/conferences where goods or services are conveyed to all attendees and in the best interest of the District, as determined by the Superintendent.;
 - Goods that are divisible among employees or otherwise shared in the office environment;
 - Gifts, per occurrence, that are naturally divisible may be accepted on behalf of the District but must be shared with, made available to, or presented to co-workers and/or the entire department. Examples of such gifts are as follows: flowers, food/gift baskets, art, advertising items, and instructional products.
2. Employees may not change the weightings or criteria after receiving bids or proposals unless legitimate, new information has been discovered, documented appropriately, and approved by the Purchasing Manager or designee.
3. Employees may not release records that contain cost estimates and/or pending, rejected, or deferred bids or proposals until the final award of the contract is made, or the project is terminated or abandoned. If such records are requested and subject to release, such release shall be done in accordance with the Georgia Open Records Act.
4. If an employee, the employee's relative, or a friend owns, manages, or sells for a vendor/supplier, the employee must recuse him/herself from decisions involving that vendor/supplier and should not access related information unavailable to competing vendors/suppliers.
5. If an employee has additional employment outside of the District, it must not conflict with, or appear to conflict with the interests of the District.

If an employee of the District is interested in doing business with the District as a vendor, the business dealing in which the employee is or seeks to become a vendor is allowable if the related vendor work being performed by such employee is outside of the employee's normal working hours and outside of the employee's area or

department of work related to their employment with the District. Further, such business dealing must also be disclosed in writing to the Chief Human Capital Management Officer, the Purchasing Department and their immediate supervisor no more than 10 business days after the commencement of such employment.

The District seeks to ensure the effective and efficient operation of the school district by doing business exclusively with companies and individuals who are ethical, honest, and responsible. All vendors and contractors seeking to do business with the District must disclose to the District, at the time of bid or proposal and ongoing thereafter as requested by the Superintendent, all employees of the vendor who are employed by the District. Vendor contracts will be terminated if the vendor, subcontractors, or vendor subsidiaries are involved in unethical behavior with any District employee. The Board may exclude any individual or company from contracting with the District for a period of no more than three years, who is disqualified pursuant to this policy or who appears on any suspended, excluded or debarment list issued by an agency of the federal, state or local government. Failure to make any such disclosures shall result in sanctions as determined by the Superintendent up to and including prohibiting the vendor or contractor from doing business with the District, and in accordance with applicable law.

Violation of purchasing ethics constitutes a serious breach of the public trust and may result in termination of employment and/or referral to law enforcement authorities.

G. Unauthorized Purchases

Employees shall be prohibited from purchasing equipment, material, supplies, services, rentals or leases in any form not prescribed herein. Any purchase contrary to the procedures set forth and/or referenced herein shall be null and void and the Board shall not be bound thereby.

H. Disqualification of Bidders or Vendors

A bidder or vendor may be disqualified from the award of a specific contract or from bidding on future contracts with the District if it is determined that the bidder or vendor, including the owners, officers, principals, or other individuals having a controlling interest in the business entity, has committed one or more of the following violations:

1. Has been convicted, at any time under any state or federal status, of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, antitrust or any other offenses indicating a lack of business integrity or business honesty which currently and directly affects its responsibility as a vendor with the District.
2. Has been debarred or disqualified from bidding on or making proposals to any federal, state, or local governmental entity or agency.
3. Has willfully failed to perform, without good cause, in accordance with the terms and conditions of one or more contracts, or has a recent record of such conduct, with the District.
4. Has willfully violated the protocol or the terms and conditions of a formal solicitation while it is still in process.
5. Has a recent, documented record of unsatisfactory performance on one or more contracts with the District or some other business entity.
6. Has submitted any false certification, bond, license, insurance information, or any other required contract documentation to the District.
7. Has failed to cooperate with a District investigation.
8. Has committed any other action of a serious or compelling nature that may adversely impact the operation or reputation of the District.

With the exception of a willful violation, of the terms and conditions of a formal solicitation while it is still in

process, written rationale and justification from the Superintendent or the Superintendent's authorized designee, shall be required before any bidder or vendor may be disqualified under this policy and/or the implementing regulations. The Board authorizes the Superintendent to adopt and issue administrative regulations consistent with this Policy further detailing the disqualification process.

I. Withdrawal of Bids

1. If, after bids are opened, the low bidder claims an appreciable error in the preparation of the bid and can support such claim with evidence satisfactory to the administrator responsible for the contracting department in collaboration with the Purchasing Department, the low bidder shall be permitted to withdraw the bid.
2. The District may convene a panel to review the bid before determining whether the low bidder made an appreciable error in the preparation of the bid as claimed. Costs incurred in connection with the review shall be borne by the bidder seeking to withdraw.
3. Action on the remaining bids shall be considered as though the withdrawn bid had not been received.
4. If the project is re-bid, the vendor who withdrew his bid shall not be permitted to submit a new bid on the project.

VI. INSURANCE

When an insurance contract is to be purchased or renewed, specifications shall be prepared and presented to the Board for approval. The approved specifications shall be used to obtain quotes or bids for the necessary insurance.

VII. IMPLEMENTING REGULATIONS

The Superintendent shall adopt administrative regulations for the day-to-day implementation of this policy. Regulations applicable to capital projects shall be consistent with Chapter 91 of Title 36 of the Georgia Code and any other applicable law.



Regulation DJE-R(1): Purchasing

Status: ADOPTED

Original Adopted Date: 03/21/2012 | **Last Revised Date:** 10/07/2019 | **Last Reviewed Date:** 10/07/2019

Pursuant to Board of Education Policy DJE, the Superintendent or designee is authorized to adopt procedures for the issuance and use of Purchasing Cards by DeKalb County School District employees and DeKalb County Board of Education members. Because local school boards are not governed by the State of Georgia purchasing department guidelines, the Superintendent of the DeKalb County School District has hereby adopted applicable purchasing department guidelines, per the State of Georgia and applicable federal travel and purchasing guidelines, per the U.S. General Services Administration.

A. Purchasing Card Restrictions

1. The Purchasing Card may only be used for instructional/office supplies and equipment, and staff travel expenditures. Special approval by the Finance

Division or the Purchasing Department is required for the following types of purchases within the approved spending limits:

- a. Goods intended for DCSD official work related use which are non-instructional utilizing budgeted funds.
 - b. Declared emergencies and natural disaster purchases in cases involving the welfare of the general public or extreme weather conditions.
2. All purchases must be within the assigned spending limits unless prior, written approval is received to exceed these limits. All Purchasing Card users have a single transaction and daily limit of \$5,000.00. The maximum monthly charge limit is \$20,000.00.

Purchasing cards shall be subject to the following restrictions and prohibitions:

1. No personal purchases or cash withdrawals.
2. No cash advances.
3. No transactions beyond the daily limit as determined by the Purchasing Department and the monthly expenditure limit of \$20,000.00 monthly.
4. No "multiple swipes" to enable a single purchase over \$5,000.00. Multiple swipes are defined as multiple purchases by the same cardholder, on the same day, from the same vendor to enable a single purchase. The invoice total must correspond to the transaction amount total for each vendor.
5. No equipment purchases exceeding \$999.99 are allowed using the Purchasing Card. The P-Card cannot be used to purchase electronic tablets or computer hardware.
6. No sales tax is to be charged. (The DeKalb County Board of Education tax exempt number is printed on the front of each PCard. In the event sales tax is charged in error, a reimbursement check must be submitted immediately by the card holder).
7. No gift card purchases.
8. No furniture purchases.
9. No food or gratuity purchases, with the exception of purchases set forth in Section B, below.
10. Data plans, software, or applications for non-District issued devices.
11. No professional services.

B. Board Members/ Staff Purchasing Card Use

1. As an exception to the above regulations and restrictions, DeKalb County School District Board Members/ Staff may utilize purchasing cards for lodging, food and travel incidentals, during travel related to school district business as deemed necessary by the Finance Division and/or the Purchasing Department. If the Superintendent disapproves of incidental expenses, or per diem meal overages, the staff member shall be notified and required to reimburse the school district for the unapproved items.
2. The U. S. General Services Administration (GSA) per diem rates shall serve as a guide adopted by the Superintendent for non-executive DCSD personnel regarding transportation and lodging Per Diem Rates. Meal allowances are set forth in Section 4 below. To ensure compliance with Federal travel guidelines, per the U.S. General Services Administration, please find below GSA's website address for lodging and Privately Owned Vehicle rates. Current Per Diem (Daily) Lodging Rates for travel outside of the Atlanta Metropolitan area and outside of the State of Georgia are located at <http://www.gsa.gov>. Rates for Privately Owned Vehicle (POV) Mileage.

Reimbursement are also located on the U.S. General Services Administration website located at <http://www.gsa.gov>.

Board Members/Executive Staff are authorized with the following daily allowance:

1. Breakfast \$15.00
2. Lunch \$20.00
3. Dinner \$40.00
4. Incidentals \$10.00

C. Using Purchasing Cards for Travel

The Superintendent may also authorize the Finance Division to establish issuance and use procedures and make necessary contractual arrangements with a financial institution to provide Travel Cards, in advance, to Non-Executive school district personnel who are authorized to travel on behalf of DCSD.

D. Unauthorized Purchases

It shall be prohibited for any employee to purchase or contract to purchase any goods or services, or to make any contract within the provision of this regulation without authorization of the Finance Division or the Purchasing Department. If any purchase is made contrary to this policy, neither the Board of Education, nor the Superintendent, shall be bound thereby.

Purchase card holders making inappropriate and/or unauthorized purchases shall be subject to suspension and termination of account privileges or other disciplinary action, up to and including termination of employment and other civil or criminal penalties to the fullest extent of the law.

E. Purchasing Ethics

All funds held by the DeKalb County Board of Education and its local schools, regardless of the source, are held in public trust. Purchasing card holders will approach all purchasing and procurement decisions as responsible stewards of public funds and shall not engage in unethical behavior or compromising practices in relationships, actions and communications with present or potential suppliers. Further, purchasing card holders shall avoid the intent and appearance of unethical behavior or compromising practices in the use of the Purchasing Card.

F. Delinquent Purchasing Card Statements and Disciplinary Actions

Delinquent Purchasing Card reconciliations, as well as outstanding discrepancies involving improper use or questionable expenditures using state or federal funds will result in the suspension or revocation of Purchasing Card privileges, as follows:

1. The first violation of this regulation will result in the immediate suspension of Purchasing Card privileges for 30 days.
 2. The second violation of this regulation will result in the immediate suspension of Purchasing Card privileges for 60 days.
 3. The third violation of this regulation will result in charging privileges being revoked indefinitely, and employee(s) shall be subject to discipline up to and including termination.
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Board Policy DJ: Expenditure of Funds

Status: ADOPTED

Original Adopted Date: 09/11/2000 | **Last Reviewed Date:** 09/11/2000

FUNDS

MISSION: To ensure proper accounting procedures for all DeKalb County School System funds.

The Superintendent and the Chair of the DeKalb County Board of Education shall have authority to file applications, requisitions, and requests for funds which are authorized for use in financing the DeKalb County School System and those included in the budget adopted by the DeKalb County Board of Education.

Board Policy DJED: Bids and Quotations

Status: ADOPTED

Original Adopted Date: 08/02/2010 | Last Revised Date: 03/04/2024 | Last Reviewed Date: 03/04/2024

Bids and Quotations

I. DEFINITIONS

- a. **Best value determination** – A Request for Proposals (RFP) is evaluated by a committee composed of Clayton County Public School employees deemed to be professionals in their area. The committee determines best value based on the vendor's responses in their proposal. Responses are evaluated based on their ability to support the achievement of required performance outcomes, best quality and economic value.
- b. **Competitive sealed bid** – A sealed, formal bid submitted by a vendor in response to an Invitation for Bids (IFB) that is to be opened publicly at a designated place, time, and date. Award is made to the lowest responsive and responsible bidder.
- c. **Publicly opened** – Bids received in response to an Invitation for Bids (IFB) shall be opened publicly, whether in person or using electronic commerce technology, digital or electronic media by the Director of Purchasing or designee.
- d. **Responsible bidder or offeror** – A contractor, business entity or individual who has the capability in all respects to perform in full the contract requirements, and also possesses the integrity and reliability that will assure good faith performance.
- e. **Responsive bidder or offeror** - A contractor, business entity or individual who has submitted a bid or proposal that fully confirms in all material respects to the IFB/RFP and all of its requirements.
- f. **RFP – Request for Proposals** - Used to solicit proposals from potential providers for goods and services. Price is not the sole evaluation factor. May include negotiation of Best & Final Offers.

II. REQUIREMENTS

- a. All purchases and contracts for goods and services that exceed \$100,000 shall be awarded either through a written competitive sealed bid process to the lowest, responsible, responsive bidder or through a competitive Request for Proposal where the best value may be selected, except for professional legal services, or in those instances specifically approved by the Superintendent or his/her designee when:
 1. essential goods or services are needed in an emergency;
 2. only one source exists for a needed good or service;
 3. goods and services are listed on the State of Georgia NIGP Code Exempt List of items deemed difficult or impractical to bid, when approved by the Director of Purchasing or designee;
 4. direct purchases are made from other government contracts or Cooperatives; or
 5. purchases of instructional materials are made as identified below.
- b. Competitive sealed bid and Request for Proposals processes will follow the procedures and guidelines listed below:
 1. The competitive process will be conducted through the Purchasing Department.
 2. Purchasing processes are approved for electronic commerce transactions, digital or electronic media, including electronic approvals and signatures.
 3. Solicitations will be advertised on the Purchasing Department website.
 4. All Invitations for Bids (IFB) and Requests for Proposals (RFP) must be sealed and publicly opened

and recorded.

5. Bids/Proposals will not be accepted after the specified deadline, which will be set forth as a specific date and time in the solicitation.
 6. The Board of Education reserves the right to accept or reject any or all bids when such action is in the best interest of Clayton County Public Schools.
- c. Price quotations may be obtained by the end user for purchases less than \$100,000 based on the following:
1. A minimum of one quote for purchases under \$10,000.
 2. A minimum of two quotes for purchases that exceed \$10,000 up to \$49,999.99.
 3. A minimum of two written quotes obtained from vendors for purchases that are \$50,000 or more but are less than \$100,000.
 4. It is expressly understood that all Clayton County Board of Education employees are legally obligated to document the selection of any vendor. All price quotations should be documented on the appropriate form(s) to accommodate this necessity and submitted with the purchasing request to the Purchasing Department for processing.
- d. Instructional Materials Exempt from the competitive process include:
1. Mandated testing, instructional programs and instructional materials approved by the Georgia Department of Education (GaDOE). GaDOE approved optional instructional programs, however, will be purchased in accordance with standard purchasing policy.
 2. Supplemental materials needed for instruction to assist in achieving desired learning objectives in the school including print, digital and multimedia components, manipulatives, supplemental resources or other instructional material from the publisher, distributor, agent or only known source.
 3. Test and test scoring services of a standardized examination from the publisher or licensed agent.
 4. Membership in various educational or related organizations, agencies or services providing direct benefits to CCPS.
- e. Instructional programs and textbooks will be approved in accordance with Board policy for curriculum development, delivery and evaluation, or approved as a separate request.
- f. Individual Board members may not attempt to exercise authority over the Superintendent or District employees during the development of specifications or in the solicitation and evaluation phase of the competitive process. Individual Board members shall not attend bid conferences or other meetings involving potential vendors. The whole Board votes on the recommendation of the Superintendent after the process is complete.
- g. Purchases from Board members or companies in which the Board members or a member of his or her immediate family has a controlling interest are prohibited. Purchases from employees or companies in which the employee, his or her spouse or children have a controlling interest and are in a procurement decision-making role are prohibited.
- h. Offerors are barred from engaging in any conversations or acts with Board members or district staff in reference to a solicitation during the term of the competitive process including soliciting and evaluating. All contact should be made with the appropriate procurement staff through the Purchasing Department.
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DJEE-R Local School Fiscal Management

8/10/16

GSBA Reference: DJEE (Local Purchasing)

RATIONALE/OBJECTIVE:

The Cobb County School District (District) has established financial procedures for the purpose of providing a high degree of accountability for District funds and other assets in compliance with Board of Education (Board) Policy DI (Accounting and Reporting) and Policy CEB (Superintendent Duties).

RULE:**Management of School Funds and Other Assets**

School principals are responsible for the management of all funds and other assets involving school activity, including but not limited to the authorization of all purchases and payments and the management of inventory and equipment. Management of school funds and other assets requires strict compliance with the Local School Accounting Standard Operating Procedures Manual, Property Control User's Guide, Board Policy, District Administrative Rules, Georgia and federal law.

Adopted: 2/14/73

Reviewed: 7/74

Revised: 7/28/83; 8/8/84; 2/25/93; 03/27/97; 04/22/99

Reclassified an Administrative Rule: 9/1/04

Revised: 1/13/10

Revised and Re-coded: 6/28/12 (previously coded as Administrative Rule DIF)

Revised: 8/10/16



COBB

**ONE TEAM.ONE GOAL.
STUDENT SUCCESS.**

PROCUREMENT SERVICES DEPARTMENT

PURCHASING REGULATIONS

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Definitions of procurement terms used in these regulations.

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These regulations establish directions, methods, and procedures for the purchase of goods and services. Authority to purchase is vested in the Superintendent who designates the Director of Procurement Services as the Chief Procurement Officer for the Cobb County School District (CCSD) and makes the regulations applicable to all CCSD acquisitions.

III. Purchasing Authority **Page 7**

The Procurement Services Department is the central element for the purchase of goods and services.

IV. Sustainable Procurement **Page 8**

The Cobb County School District is committed to best practices in sustainable procurement.

V. Responsibilities **Page 10**

Basic responsibilities of individuals and entities concerning the purchase of goods and services including The Board of Education, the Superintendent, Senior Executive Director of Business Services, the Director of Procurement Services, and other administrators of the CCSD as well as all school/department personnel.

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Three priorities for the Procurement Services Department include routine, urgent, and emergency. The time frame for planning purchasing procedures is established in this section.

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XIII. Code of Ethics Page 46

Describes the code of ethics adopted by the CCSD.

SECTION I

PROCUREMENT TERM DEFINITIONS

The following are definitions of procurement terms used in these regulations:

- A. Appeal – Within the context of the Cobb County School District (CCSD) procurement practices, an appeal process is used in two instances: (1) To request review of a protest decision issued by the Director of Procurement Services, or (2) To request review of a decision to suspend or disqualify a vendor from doing business with CCSD for a specified time.
- B. Award date – The date on which the written Award Letter is dated.
- C. Best Value - A procurement method that emphasizes value over price. An assessment of the return that can be achieved over the useful life of the item, e.g., the best combination of quality, service, time, and price.
- D. Bid – The response by a vendor to an Invitation for Bid (IFB).
- E. Bidder – A vendor who submits a response to an Invitation for Bid (IFB).
- F. Board Approval Date – The date that the Board of Education votes on an award recommendation.
- G. Bonfire Interactive Portal – Bidding/contract management software program used by CCSD.
- H. Competition – The process by which all responsible bidders/offerors are allowed to compete.
- I. Competition Thresholds – Defined expenditure levels, which establish the bounds for the use of certain procurement methods.
- J. Competitive Range – The group of proposals, as determined during the evaluation process for competitive negotiation, includes only those offerors considered to have a reasonable chance of being selected for award and who are therefore chosen for additional discussions and negotiations. Proposals not in the competitive range are given no further consideration.
- K. Construction Projects – Includes any improvements to existing CCSD property, whether new construction, modification, alteration or renovation, either interior or exterior. All improvements to District property must comply with appropriate CCSD Board Policy and

SECTION I

PROCUREMENT TERM DEFINITIONS

Administrative Rules. Applicable Federal/State/Local codes, laws, guidelines, and regulations will apply.

- L. Contract Administration – Management of an awarded solicitation including but not limited to:
 - 1. Monitoring vendor(s) for adherence to contract requirements (including price and performance);
 - 2. Periodic meetings with the vendor(s) and end-user department;
 - 3. Distributing and summarizing vendor performance surveys; and
 - 4. Maintaining a file of correspondence after award.
- M. Disqualification – Action was taken by CCSD to prohibit vendors from doing business with CCSD for a period of time of at least one (1) year, not to exceed a three-year (3) maximum.
- N. Environmentally Preferable Products and Services – Have a less negative effect on human health and the environment than competing products or services that serve the same purpose. Factors that may be considered include raw materials acquisition, production, manufacturing, packaging, distribution, reuse, operation, maintenance, disposal, and/or fair trade standards.
- O. Environmental Purchasing - CCSD is committed to environmental stewardship and seeks the purchase of environmentally preferable products and services whenever they perform satisfactorily and are available at a reasonably competitive price.
- P. Georgia Procurement Registry (GPR) – This is a free web-based advertising system for publicizing government contract opportunities.
- Q. Invitation for Bid (IFB) – The solicitation document used by CCSD to solicit offers for the supply of goods and/or services in a sealed bid process.
- R. Mandatory/Minimum Requirements – May apply to Request for Proposals (RFP), Invitation for Bids (IFB), and Request for Quotes (RFQ) and are conditions set out in the specifications/statement of work that must be met without alteration. Not meeting mandatory requirements may be grounds for disqualification.

SECTION I

PROCUREMENT TERM DEFINITIONS

- S. Offer – A response to a solicitation document, inclusive of a bid in response to an Invitation for Bid, a proposal in response to a Request for Proposal, or a quote in response to a Request for Quote.
- T. Offeror – A vendor who returns a proposal in response to a Request for Proposal solicitation before the date and time set for its receipt.
- U. Order Splitting – Dividing a purchase into separate transactions, or the purchase of related items/services via separate transactions to circumvent CCSD Board Policy and/or Purchasing Regulations. This is an example of an Unauthorized Purchase and is expressly prohibited.
- V. Proposal – The response by a vendor to a Request for Proposal solicitation.
- W. Request for Information (RFI) – The informal solicitation document whereby vendors are asked to present information on particular goods or services. Information provided may include best practices, industry standards, technology issues, etc. CCSD may or may not choose to award and purchase from the information provided.
- X. Protest – A written objection by a participating party to a solicitation or a proposed award or award of a contract, to receive a remedial result.
- Y. Request for Proposal (RFP) – The solicitation document used in the competitive proposal process, whereby vendors are asked to submit offers for goods and/or services in a designated format, which allows for the consideration of predetermined factors in addition to price, in the evaluation, negotiation and award process. Provides for the negotiation of all terms, including price before contract award. The solicitation may or may not include a provision for the negotiation of Best and Final Offers (BAFO).
- Z. Request for Qualifications (RFQu) – A document issued by procurement staff to obtain statements of the qualifications from potential vendors. Can be used to gauge potential competition in the marketplace and/or identify qualified vendors, before issuing a solicitation.
- AA. Request for Quote (RFQ) – The solicitation document used by CCSD to solicit offers for the supply of goods and/or services. Solicitation of a price quote should be completed by an authorized CCSD staff person. A Request for Quote may be used when a purchase

SECTION I

PROCUREMENT TERM DEFINITIONS

is less than \$100,000 or is urgent enough to warrant bypassing the IFB/RFP process. Evaluation and recommendation for award are based on the response that best meets price, quality, delivery, service, past performance, and reliability.

- BB. Response Due Date and Time – The deadline for a vendor to submit a response to a solicitation document; specified in a solicitation document.
- CC. Responsible – Term used to describe a vendor who is determined by Procurement Services to have:
1. The ability, capacity, and skill to provide the goods/service required;
 2. The capability to provide the goods/service promptly, or within the time specified, without delay or interference;
 3. The character, integrity, reputation, judgment, experience, and efficiency necessary to conduct business in good order;
 4. Provided satisfactory performance on previous contracts, if any;
 5. Previously and presently complied/s with the laws and policies relating to the goods/services required;
 6. Sufficient financial resources and ability to perform the service;
 7. The ability to provide goods or services for the particular use required; and,
 8. Not provided any conditions in the bid/proposal that would have the response submission considered non-qualified and therefore non-responsive.
- DD. Responsive – Term used to describe a vendor who has submitted a response to a solicitation that conforms in all material respects to the requirements outlined in the solicitation.
- EE. Simplified Acquisition Threshold for Purchases Utilizing Federal Funds – The CCSD defines the Simplified Acquisition Threshold (SAT) for purchases utilizing Federal Funds to be \$250,000.
- FF. Solicitation Document – A term used to describe an Invitation for Bid, Request for Proposal, Request for Information, or Request for Quote document.

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PROCUREMENT TERM DEFINITIONS

- GG. Subject Matter Expert/Consultant – Person with extensive skill and/or knowledge in a particular area of expertise that uniquely qualifies him or her to perform some specialized service.
- HH. Suspension – Action was taken by CCSD to prohibit a vendor from doing business with CCSD for a period not to exceed one (1) year while corrective action is being taken.
- II. Sustainable Procurement - A purchasing and investment process that integrates economic, environmental, and social impacts and principles into procurement processes and decisions.
- JJ. Vendor – A vendor includes, but is not limited to, any corporation, partnership, association, sole proprietorship, or other business entity as well as the owner(s), principal(s), or other individual(s) having a controlling interest in the business entity that performs services, or sells goods required by a contract. An entity submitting a response to an IFB, RFP, or RFQ. Bidder/Offeror/Vendor/Supplier/Contractor may be used interchangeably.
- KK. Waste Prevention – Any action undertaken by an individual or organization to eliminate or reduce the amount or toxicity of materials before they enter the waste stream. This action is intended to conserve resources, promote efficiency, and reduce pollution.
- LL. Working days – Means all days except Saturdays, Sundays, and all CCSD holidays. In calculating the time, the first day shall not be counted but the last day shall be counted.

SECTION II
PURCHASING REGULATIONS

The purchase of goods and services required by the various departments or schools that derive support wholly or in part from Cobb County School District (CCSD) shall be in accordance with the purchasing regulations as presented herein. These regulations shall apply to all acquisitions involving the expenditure of CCSD funds or funds provided from other sources (federal, state, local, grants, etc.) for the use by CCSD.

Guidelines

The school system must buy supplies and services from the business community to operate. The Cobb County Board of Education (Board) will appropriate funds that will be used by the Superintendent through his agent, the Director of Procurement Services, to procure the required goods and services. The guidelines in which the purchasing function shall operate, including funds from all sources, are as follows:

Authority to obligate Board funds to an agency outside the school system is vested solely in the Superintendent who shall designate the Director of Procurement Services as the Purchasing Agent and Chief Procurement Officer for CCSD.

The Director of Procurement Services, under the direction of the Senior Executive Director, Business Services, shall have the authority to purchase materials, supplies, equipment, construction, and other services.

Purchases shall be made only after the Board has appropriated funds. All purchasing activities on behalf of CCSD will be in accordance with these regulations and the laws of the State of Georgia. If a conflict exists between these regulations and applicable federal/state/local laws, grants, or other governing regulations, then the higher-level governing law/regulation that imposes additional requirements or regulations shall control.

SECTION III
PURCHASING AUTHORITY

Procurement Services has the authority and responsibility to purchase only authorized supplies and services.

Central Purchasing

Purchases shall be made by the local schools/departments and approved by Procurement Services under the authority granted to the Director of Procurement Services. Procurement Services shall not approve the purchase of goods or services without a properly executed and approved document with approved funds.

SECTION IV SUSTAINABLE PROCUREMENT

CCSD is committed to sustainable procurement and understands procurement decisions have a social, economic, and environmental impact. We are committed to awarding contracts in a responsible, sustainable manner by following the best practices/priorities listed below.

Best Practices/Priorities:

1. Waste prevention by recycling, reducing use, and reusing materials.
2. Purchase products that minimize environmental impacts, toxins, pollution, and hazards to workers and the community.
3. Act with fiscal responsibility by balancing price, performance, and environmental considerations.
4. Review specifications to eliminate barriers to recycled content products when feasible. Encourage the use of recycled materials and environmentally preferable products and services when they perform satisfactorily and are available at reasonably competitive pricing.
5. Encourage the specification of environmentally preferable products that include recycled content, are durable and long-lasting, conserve energy and water, are responsibly sourced, and minimize exposure to toxins.
6. Recycling Programs include single-stream waste recycling and responsible disposal of surplus electronics and equipment in accordance with current United States Environmental Protection Agency (EPA) regulations.
7. Develop and maintain information about environmentally preferable products and recycled products purchased by CCSD, as well as purchases that include recycling programs for consumable materials waste.
8. Surplus items are disposed of responsibly in compliance with applicable EPA regulations.
9. Utilize extended warranties to prolong the life of the equipment.
10. Achieve value for money and more efficient use of public resources.

SECTION IV
SUSTAINABLE PROCUREMENT

11. Demonstrate social and environmental responsibility through the purchase of sustainable products and services.
12. Support and encourage innovation by demonstrating a preference for more sustainable products and services.
13. Encourage the industry to develop the capacity to operate in a clean, green company.
14. Support vendors who are socially responsible and adopt ethical practices listed in our vendor code of ethics.
15. Ensure compliance with relevant regulatory requirements.
16. Maintain transparency in all solicitation processes.

SECTION V
RESPONSIBILITIES

The basic responsibilities of entities and individuals involved in the procurement process are described herein.

Responsibilities

A. The Board shall:

1. Provide policy for the purchasing system;
2. Appropriate funds from which purchases for goods and services are executed;
3. Approve or disapprove recommendations of the Superintendent, Senior Executive Director, Business Services, and/or the Director of Procurement Services;
4. Provide general oversight over the purchasing system.

B. The Superintendent shall:

1. Develop and recommend to the Board policies to ensure efficient and economical purchasing in support of CCSD operations;
2. Supervise the Director of Procurement Services through the Senior Executive Director, Business Services;
3. Accept authority to purchase given by the Board and delegate day-to-day authority to the Director of Procurement Services;
4. Exercise authority for purchases not delegated to the Director or other designees.

C. The Senior Executive Director, Business Services shall:

1. Directly supervise the Director of Procurement Services;
2. Provide direction to solving specific problems affecting the purchase of goods and services.

D. The Director of Procurement Services shall:

1. Serve as Purchasing Agent and Chief Procurement Officer for the Board;
2. Supervise the day-to-day activities of Procurement Services;
3. Contract for the purchase or acquisition of supplies, materials, equipment, construction, and services, as may be required and funded;

SECTION V
RESPONSIBILITIES

4. Ensure all contract actions comply with applicable local, state, and federal laws and regulations, as well as Board policies and procedures;
5. Procure quality goods and services to meet the needs of CCSD at pricing that provides the best value;
6. Consider environmentally preferable procurement initiatives when possible and beneficial to CCSD;
7. Promote efforts to assure all business enterprises have an equal opportunity to participate and share in the purchasing activity of CCSD;
8. Modify/approve specifications and ensure full and open competition is achieved on all purchases within parameters outlined in these and other CCSD regulations;
9. Provide direction and guidance for the operation of Purchasing Management;
10. Ensure training on CCSD purchasing policies and regulations of key District staff responsible for the purchasing function at various levels;
11. Maintain a standard purchasing nomenclature for purchased items;
12. Take advantage of economies of scale by buying in quantity when advantageous to CCSD;
13. Take advantage of all tax exemptions;
14. Determine the appropriate purchasing method for each purchasing action;
15. Establish and maintain a purchasing system of quality and integrity;
16. Review threshold amounts and recommend necessary changes;
17. Audit purchases from requisitions, procurement cards, and other CCSD contracts for compliance with all applicable laws, policies, and procedures.
18. Establish necessary rules for the operation of Procurement Services and the implementation of CCSD Policy and Regulations;
19. Settle and resolve protests dealing with purchasing actions;

SECTION V
RESPONSIBILITIES

20. Competitively solicit, whenever possible, with Cobb County or other governmental entities to maximize savings for taxpayers when it is in the best interest of both parties to do so;
 21. Compare competitively sought pricing to statewide contracts and/or other governmental cooperative contracts/discounts (e.g., OMNIA Partners, National Association of State Procurement Officials (NASPO), Sourcewell, and others) available to determine the best value for the CCSD. Procurement may recommend the use of state contracts or other available governmental cooperative contracts/discounts when the contract offers the best value to the CCSD.
- E. The Customers (departments and schools receiving support from Procurement Services) shall:
1. Provide timely and adequate identification of a requirement, funding, and authorization to procure;
 2. Review/approve solicitations/specifications/quantities;
 3. Participate as requested by the Director of Procurement Services in pre-bid/proposal conferences;
 4. Participate in the review of solicitation responses;
 5. Participate or provide third-party subject matter expert(s) to participate in the evaluation of RFP responses;
 6. Responsible for ensuring key District staff members (e.g., bookkeepers) who are involved in the procurement process participate in training provided by Procurement Services on CCSD purchasing policies and regulations;
 7. Provide for any other assistance in the procurement process as may reasonably be requested by the Director of Procurement Services;
 8. Enter and approve purchase orders.
 9. Provide accurate and timely process of procurement card documentation to Financial Services.

SECTION VI
PURCHASING ADMINISTRATIVE LEAD TIME (PALT)

Priorities are established herewith to be used in processing purchasing actions and time frames for processing various purchasing actions that Customers may use for planning purposes.

Applicability: This section applies to all purchasing actions by Procurement Services.

A. Priorities:

Three (3) priorities will be used for processing purchasing actions in Procurement Services as follows:

1. Routine - Purchase requirements are received by Procurement Services and assigned for action generally in keeping with the chronological order of receipt, and processed in accordance with the Purchasing Administrative Lead Time detailed in Section VI, Section B.
2. Urgent - The Customer, whose circumstances may not be deemed so severe as to require emergency action but are of such a nature as to require more than routine processing, may ask the Director of Procurement Services to assign an urgent priority. The designation of “urgent” will cause the requirement to be acted upon by Procurement Services over any routine requirements that may be at hand. “Same day” or “next day” action by Procurement Services will not circumvent other purchasing procedures required by law, Board policy, or this regulation; an urgent priority assigned by the Director of Procurement Services simply moves the requirement to the head of the line in Procurement Services.
3. Emergency - The Customer whose circumstances may be deemed so severe as to require emergency actions may ask Procurement Services to assign an emergency priority. Emergencies shall include, but not be restricted to, the purchase of items necessary to the health, well-being, or safety of persons and/or situations. The designation of “emergency” will cause the requirement to be acted upon by Procurement Services over any routine or urgent requirement at hand. These requirements shall receive “same day” action, if possible, and may circumvent other

SECTION VI

PURCHASING ADMINISTRATIVE LEAD TIME (PALT)

purchasing procedures required by Board policy to the extent permitted thereby and/or by other applicable laws.

B. Purchasing Administrative Lead Time (PALT):

Definition –PALT is the time taken to process a purchasing action within Procurement Services from the point when acceptable specifications, ready for release, are presented to Procurement Services to the point that recommendation for award is made. PALT does not include the time required to research and develop the specifications for solicitation, the time taken for administrative approvals of purchase requisitions nor the time it will take for the successful vendor to provide the supplies or services.

Time Frames for PALT –Workload within Procurement Services and the nature of the solicitation will serve to increase or decrease PALT to some extent. PALT may be longer for solicitations that require extensive preparation and/or Board approval and/or legal review. In addition, PALT will be adjusted accordingly when mandated by requirements related to funding sources or applicable laws, etc. (e.g. construction projects, eRate). The table below lists the typical range for PALT for each solicitation type:

PURCHASING ADMINISTRATIVE LEAD TIME (PALT)	
<u>Solicitation Type</u>	<u>Days</u>
Request for Quote	15—25
Invitation for Bid	35 – 60
Request for Proposal	45 – 180

Section VII

PROCUREMENT AND AWARD METHODS

A. COMPETITIVE SOLICITATION METHODS

Except for purchases made following other provisions of this regulation, all purchases or contracts to purchase goods or services with District funding shall be based on competitive quotations, bids, or proposals as follows:

1. Purchases less than \$10,000 and not already on an existing contract may be accomplished without multiple quotes. Purchaser should use their best judgment when making the purchase.
2. Purchases from \$10,000 to \$99,999.99 and not already on an existing contract may require pricing to be secured by Procurement Services. Customers should use the Request for Solicitation form available on the Procurement Services SharePoint site and submit it as instructed on the form. Pricing may be secured via written quote, email, phone, internet, or through the Bonfire Interactive portal.
3. Purchases of \$100,000 or more and not already on an existing contract require Procurement to issue a formal IFB or RFP. Board approval is required for the award of IFBs/RFPs greater than \$200,000 except for those products/services included on the Board Pre-Approved List of Expenditures. Check with Procurement Services regarding assistance with the solicitation process and the need for Board approval. All information to be included in a Board Agenda Item must be received in Procurement Services a minimum of two (2) days before agenda items are due to the Superintendent's office.
4. **Purchases using Federal Funds and citing a CCSD Exception to Full and Open Competition Item(s)/Service(s):**
 - a. Purchases under \$10,000 not already on an existing contract purchaser should use their best judgment.
 - b. Purchases \$10,000-\$250,000 – Cite the appropriate exception to full and open competition. Price quotations must be obtained from at least two (2) qualified sources and uploaded into Munis or kept at the school/department.
 - c. Purchases at the Simplified Acquisition Threshold \$250,000 or more require a formal solicitation to be completed by Procurement Services.

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PROCUREMENT AND AWARD METHODS

5. The Director of Procurement Services will determine the most applicable method for a solicitation. Once Procurement Services has implemented the competitive solicitation process, the selected method of the solicitation will not be changed. To obtain the most favorable price and to ensure a reliable source of supply, the Director of Procurement Services is authorized to include an escalation and/or de-escalation clause in the solicitation conditions.

B. EXCEPTIONS TO FULL AND OPEN COMPETITION FOR NON-FEDERAL, NON-GRANT FUNDS

Procurement Services recognizes that there are circumstances where full and open competition is not in the District's best interest. If the requesting Customer is utilizing grant funds or other special funds, it is their responsibility to verify that the funds do not require a competitive solicitation before citing one of the exceptions. The following situations can necessitate exceptions to full and open competition through competitive solicitation:

1. Sole/Single Source Purchase - When supplies or services are readily available from one responsible source. Use of this authority may be appropriate in situations such as the following, (the examples are not intended to be all-inclusive and do not constitute authority in and of themselves):
 - a. When there is a reasonable basis to conclude that the minimum needs can best be satisfied by unique supplies or services readily available from one source with unique capabilities.
 - b. The existence of limited rights in data, patent rights, copyrights, or secret processes; the control of basic raw material; or similar circumstances make the supplies and services available from one source.
 - c. When purchasing utility service(s) (gas, electric power, etc.), circumstances may dictate that only one vendor can furnish the service.
 - d. When the Superintendent or designee (e.g., head of the department making the purchase) has determined in accordance with a program for standardization, continuity of operations, cost, or labor savings that are in the best interest of CCSD to limit purchases to specified products/services.

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PROCUREMENT AND AWARD METHODS

- e. When purchasing over the designated threshold, Customers must use the “Sole/Single Source Justification” form, available on the Procurement Services SharePoint website to submit the following information:
 1. Explain why this is the only product or service that can meet the need of the purchasing agency.
 2. Explain why this vendor is the only practical available source from which to obtain this product or service.
 3. Describe what efforts were made to negotiate to get the best price, delivery, warranty, and payment terms for the CCSD. Procurement Services reserves the right to negotiate further with the vendor for discounts, the best value, etc.
 4. Include any documentation from the manufacturer or publisher to support the “Sole/Single Source” status.
2. Emergency Requirement - Emergency Requirement can be cited when the need for supplies or services is of such unusual and compelling urgency that the school or the school system would be seriously injured unless it is permitted to limit the number of sources from which to solicit bids or proposals. Use of this authority applies in those situations where delay in award would result in serious injury, financial or other, to CCSD. The Director of Procurement Services shall approve the use of this exception, upon recommendation by the division administrator of the user department. It is the Customer’s responsibility to gain the appropriate approval.
3. Academic Prerogative –Academic Prerogative can be cited when contracted services or academic materials, such as books, posters, displays, games, educational software, or art materials are needed for compatibility/continuity with existing curriculum programs or to meet state/federal requirements. Academic materials can be selected from a source (such as a catalog) at the discretion of a teaching professional in the performance of teaching duties. Contracted staff development/professional learning services, including training and consultative services, can be selected from a source identified as providing the expertise and availability on the particular topic at the discretion of the school principal or appropriate department or division head. Additionally, contracted

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PROCUREMENT AND AWARD METHODS

services for guest performers and other performing arts experts to provide performances, workshops, and/or other instructional services can be selected from a source identified as providing the expertise and availability on the particular topic at the discretion of the teaching professional. No special authority is necessary unless the Director of Procurement Services challenges a purchasing action as an abuse of this exception. The Chief Academic Officer, along with the Senior Executive Director of Business Services, shall be the determining authority for such a challenge.

4. School Safety Operations / Police Department: **(Do not use if the purchase is using Grant/Federal Funds)** Products and services related to safety and security can be selected at the discretion of a safety/security professional. No special authority is necessary unless the Director of Procurement Services challenges a purchasing action as an abuse of this exception. The Chief Technology & Operations Officer, along with the Senior Executive Director of Business Services, shall be the determining authorities for such a challenge.
5. Venues, Products, Events and Services for Student and Staff Activities - The selection of venues, products, events and services for some student activities/products, including but not limited to, field trips, homecoming, prom, and graduation activities does not lend itself to the competitive procurement processes utilized by the District. Schools are encouraged to follow the guidelines listed below regarding these types of activities/products/services:
 - a. Funds collected from students and other sources for these activities shall be expended for the project including school-related incident expenses incurred by teachers and other school personnel.
 - b. All quotations should be made in writing and must meet all school-identified requirements.
 - c. Schools shall enter into an agreement with the vendor which will specify, but not necessarily be limited to, the following:
 1. Price
 2. Time of Delivery/Event
 3. Service and Warranty Requirements

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PROCUREMENT AND AWARD METHODS

4. District-approved accounting practices will be followed in the expenditure of these funds.

Venues, products, events and services for staff activities including, but not limited to, meetings, speakers, luncheons, and hospitality events are excluded from the competitive process as well.

No special authority is necessary unless the Director of Procurement Services challenges a purchasing action as an abuse of this exception. The Deputy Superintendent, along with the Senior Executive Director of Business Services shall be the determining authorities for such a challenge.

6. Professional Services - Contracted professional services including but not limited to architectural, engineering, consultative or advisory services can be selected from a source identified as providing the expertise and availability on the particular topic at the discretion of the applicable Department Head. The Department Head will negotiate fees in compliance with state law when applicable. For fees for services not governed by state law, the Department Head will utilize industry standards and market conditions in negotiating fees. No special authority is necessary unless the Director of Procurement Services challenges a purchasing action as an abuse of this exception. The Deputy Superintendent, along with the Senior Executive Director of Business Services, shall be the determining authorities for such a challenge.
7. Charter Bus Services –Charter bus services are procured in some cases for off-site student events such as, but not limited to, field trips, athletic, music, academic, or other events and competitions. Student safety is the primary concern in such instances. Therefore, charter bus services are excluded from the formal competitive solicitation process. CCSD Risk Management will maintain a list of carriers that have been pre-approved for liability purposes.

C. EXCEPTIONS TO FULL AND OPEN COMPETITION FOR FEDERAL FUNDS

1. Federal Awarding Agency Approval –The Federal awarding agency or pass-through entity expressly authorizes noncompetitive proposals in response to a written request from the non-federal entity.

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PROCUREMENT AND AWARD METHODS

2. Inadequate Competition –After solicitation of a number of sources, competition is determined inadequate.
3. Small Purchase/Academic Prerogative for Purchases \$10,000 - \$250,000 –Price quotation must be obtained from at least two (2) qualified sources. Small Purchase/Academic Prerogative can be cited when contracted services or academic materials, such as books, posters, displays, games, educational software, or art materials are needed for compatibility/continuity with existing curriculum programs or to meet state/federal requirements. Academic materials can be selected from a source at the discretion of a teaching professional in the performance of teaching duties. Contracted staff development/professional learning services, including training and consultative services, can be selected from a source identified as providing the expertise and availability on the particular topic at the discretion of the school principal or appropriate department or division head. Additionally, contracted services for guest performers and other performing arts experts to provide performances, workshops, and/or other instructional services can be selected from a source identified as providing the expertise and availability on the particular topic at the discretion of the teaching professional. No special authority is necessary unless the Director of Procurement Services challenges a purchasing action as an abuse of this exception. The Chief Academic Officer, along with the Senior Executive Director of Business Services, shall be the determining authorities for such a challenge.

The appropriate exception must be cited on the Requisition/Purchase Order, FS 213 Performance Contract/Munis Contract, Request for Check, or any other payment method.

Board Policy DJE: Purchasing

Status: ADOPTED

Original Adopted Date: 03/31/2000 | **Last Revised Date:** 11/21/2008 | **Last Reviewed Date:** 11/21/2008

Board Policy Descriptor Code: DJE

Purchasing

It is the intention of the Board of Education that the School District purchase services and purchase or lease equipment, supplies and other materials (including items for the Food and Nutrition Program) that best meet the needs of the District at the best value. A competitive process should be followed for each purchase based on procedures or regulations to be determined by the Superintendent. The Superintendent or his designee shall have the authority to issue regulations, competitive solicitations, or other procedures governing this process where there exists no specific state law or State Board rule that must be followed. In addition to price, the procedures established by the Superintendent may consider performance of the vendor with the School District, performance of the vendor with other customers, the convenience of the vendor, other benefits offered by the vendor, the uniqueness of the product or service or any other factor which may make the acceptance of a particular proposal from a particular vendor in the best interest of the School District.

The Superintendent or his designee is authorized to approve any and all purchases from budgeted funds of less than \$100,000. For any purchase in excess of that amount, the Superintendent shall provide written documentation to the Board of Education justifying the recommendation.

At all times, the Superintendent shall follow any mandated processes required by state law, set forth in State Board of Education rules or procedures or regulations of the State Department of Education.



Book	District Policy
Section	D - Fiscal Management
Title	Purchasing
Code	DJE
Status	Active
Cross References	DJE - Purchasing
Adopted	July 1, 1986
Last Revised	October 22, 2021
Last Reviewed	October 21, 2021

Authority to obligate System funds to an agency outside of the System is vested in the Fulton County School Board of Education ("School Board") and administered by the Superintendent and his/her designee(s). All such purchases and/or contracts shall be awarded contingent upon an appropriation having been made and covered by unrestricted cash balances in the appropriate fund account.

The Board of Education, through its Executive Director of Contracting or other designees, shall make all purchases for equipment, supplies, materials, services, rents or leases as necessary for the operation of the School System. The Executive Director of Contracting or designee shall enter into purchase agreement(s) for replacement building construction, modification or rehabilitation of system facilities. All purchases shall be strictly in accordance with the policies, rules, and regulations of the Fulton County Board of Education, the State Board of Education, and in compliance with federal and Georgia laws. Agreement(s) for services or utilities from government agencies are exempted from the competitive bidding requirements. Legal services, financial advisors, organization memberships for the district, and any special consulting services are exempted from the competitive bidding requirements but are required to be recommended by the Superintendent and approved by the Board according to the Approval Limits outlined in the corresponding procedure. All other services will be solicited in accordance with Operating Guideline DJE – Purchasing in the same manner as other purchases.

The following types of purchases are strictly prohibited by Fulton County Schools:

1. Goods or services not directly related to job responsibilities or other official Fulton County Schools' business (i.e. personal purchases);
2. Alcoholic beverages or products;
3. Tobacco products;
4. Membership at wholesale warehouses and shopping clubs (e.g. Sam's, Costco, Amazon Prime).

Purchasing Cards (P-Cards)/Corporate Cards

The Executive Director of Contracting or designee may issue government purchasing cards and/or corporate cards to elected members of the Board of Education, division heads, or school/department heads. The card shall be used solely for the purpose of purchasing items and services that are directly related to the duties of the Fulton County Board of Education and Fulton County Schools.

Prior to the use of the purchasing and/or corporate card, the authorized user shall sign and accept an agreement with Fulton County Schools that they will use such cards only in accordance with the policies and procedures of Fulton County Schools' Purchasing/Corporate Card Program. There shall be a per transaction limit of \$2,499.00 on the purchasing and

corporate cards.

In addition to the purchases above, the purchasing cards and/or corporate cards may not be used to purchase the following items:

1. Data plans, software, or applications (apps) for non-district issued devices, including, but not limited to, smart phones, laptop computers, and tablets;
2. Cash advances;
3. Gift cards, stored value cards, calling cards, and similar products;
4. Entertainment (e.g. in-room movies for District employees traveling on business);
5. Mechanical repairs and/or maintenance for State-owned, District-owned, or rental vehicles.

The purchasing/corporate card program shall be administered by the Executive Director of Contracting or other designees. The Executive Director of Contracting or designees shall conduct a quarterly review of the purchasing/corporate card program to ensure that purchases made are related to the duties of Fulton County Board of Education and Fulton County Schools.

Cardholders, program users, or supervisors/approving officials who knowingly, or through willful neglect, fail to comply with the purchasing/corporate card program may be subject to suspension or termination of account privileges or other disciplinary action, up to and including termination of employment and other civil or criminal penalties to the fullest extent of the law.

All purchases from budgeted funds at or above \$100,000.00 shall have the approval of the Board prior to purchase. Purchases at or above \$100,000.00 should not be divided in order to avoid the requirement of School Board approval.

Multi-year agreements with vendors are permissible but must comply with all applicable federal and state laws as well as School Board policies and procedures. Further, any renewal of a multi-year agreement must have the approval of the School Board prior to the execution of the renewal for each year that the agreement is renewed.

Emergency purchases \$100,000.00 or greater may be made if critical to the continued operation of the office or District upon approval by the Superintendent with timely notification to all Board members. Such approval shall be affirmed at the next Board meeting.

The term "budgeted funds" is defined to include student activity funds.

Purchasing Policy

For information about procedures related to specific policies, contact the Office of the Executive Director for Administration and Policy at 678-301-6005.

Purchasing

Level:	Accompanying	Descriptor Code:	Rescinds
Policy: D-Fiscal Management	Procedure: PDJE, P.DJEB	DJE	March 22, 2017
Descriptor Term:		Effective Date:	Date Last Reviewed
Purchasing		September 13, 2018	July 18, 2023

The Gwinnett County Board of Education through its agent, the Superintendent or designee, shall purchase or contract to purchase supplies, materials, equipment, and services, and lease equipment or services. The Superintendent or designee shall enter into contracts for building construction, modification or rehabilitation of system facilities, School Food Nutrition requirements and other items that may be required for the efficient operation of the school system. All purchases shall be in accordance with the policies established by the Gwinnett County Board of Education, the Rules of the State Board of Education and the laws of the State of Georgia.

All purchases and/or contracts shall be awarded contingent upon an appropriation having been made and the availability of funds. All requests for purchases or contracts not provided for in the budget will require prior approval of the Board of Education or the Superintendent of Schools, whichever is appropriate according to the dollar level of the purchase.

Purchases from board members or companies in which the board member or a member of his/her immediate family has a controlling interest are prohibited. Purchases from employees or companies in which the employee, spouse or children have a controlling interest and are in a procurement decision-making role are prohibited. See Policy File GBRI for definition of immediate family.

1. PURCHASES WITHOUT BID APPROVAL LIMITS

The following items, regardless of amount, shall be purchased by the Superintendent or designee.

- a. Textbooks, films, slides, video materials or other items, newspapers, library books, reference materials, subscriptions, computer software or other instructional media from the publisher, distributor or agent.
- b. Tests and test scoring services of a standardized examination from the publisher or licensed agent.
- c. Agreements for maintenance service from the original vendor or authorized agent of the installed equipment or products if the same cannot be competitively bid.
- d. Continuance of an existing purchase agreement, bid, request for proposal, time and material contract, rent, lease or purchase order duly authorized by the Board or its agent.
- e. Additional purchase of like equipment, material, supplies, services, rentals or leases previously approved may be made provided the additional order is at the same or less price. Contractual provisions can be made to provide an inflation/deflation mechanism for price adjustments based on the Consumer Price Index or Producer Price Index for commodities or services.
- f. Items from an existing contract or bid from another local, state, or federal governmental agency, or from a recognized public oriented Purchasing Cooperative or Consortium.
- g. Purchase of goods and services listed on the State of Georgia NIGP exempt list - <https://doas.ga.gov/assets/StatePurchasing/NEADocumentLibrary/NIGPExemptList.pdf>
(<https://doas.ga.gov/assets/State%20Purchasing/NEADocumentLibrary/NIGPExemptList.pdf>)

2. APPROVAL LIMITS

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- a. Purchases from budgeted funds in the amount of \$5000 or less for any item or group of items shall be made with the approval of the Department Head, Principal or any employee who has been issued a procurement card once procedural requirements are met.
- b. Purchases from budgeted funds for any item or group of items with a value of \$5001 - \$25,000 shall be made by a purchasing agent designated by the Director of Purchasing or by the Director of Purchasing once procedural requirements are met.
- c. Purchases from budgeted funds for any item or group of items with a value of \$25,001 - \$100,000 shall be made by a purchasing agent upon approval of the Director of Purchasing or by the Director of Purchasing once procedural requirements are met.
- d. Contracts for Business Operations capital projects from budgeted funds with a value up to \$500,000 shall be made by the Chief Business Operations Officer once procedural requirements are met. Change orders to existing Business Operations contracts may be approved by the Chief Business Operations Officer up to \$250,000 and by the Superintendent up to \$1,000,000. Any change order in excess of \$1,000,000 shall be approved by the Board of Education.
- e. Purchases from budgeted funds for any item or group of items with a value of \$100,001 - \$500,000 shall be made by the Director of Purchasing upon approval of the Chief Financial Officer once procedural requirements are met.
- f. Purchases from budgeted funds for any item or group of items with a value of \$500,001 - \$1,000,000 shall be made by the Director of Purchasing upon approval of the Superintendent once procedural requirements are met.
- g. Purchases from budgeted funds for any item or group of items with a value of \$1,000,000 or greater shall be made by the Director of Purchasing upon approval of the Board of Education once procedural requirements are met.
- h. Emergency purchases above \$1,000,000 or which have not been provided for in the budget may be made if critical to the continued operation of the School District upon approval by the Superintendent. Such action shall be reported to the Board of Education at its next regularly scheduled meeting.

3. PROCUREMENT CARD PURCHASES

The Superintendent or designee is authorized to issue purchase cards to Gwinnett County Board of Education employees. The Superintendent shall adopt procedures for the issuance and use of purchase cards. The procedures shall provide for training in the appropriate use of purchase cards for all employees to whom cards are issued. Purchase card holders making inappropriate and/or unauthorized purchases shall be subject to discipline up to and including termination. Purchases with the card should be of such a nature that the Purchasing Department cannot add value to the process by coordinating the purchase (typically for orders of \$150.00 or less). Purchasing cards shall be subject to the following restrictions:

- Purchasing cards cannot be used for:
 - Personal purchases or cash withdrawals.
 - Cash advances.
 - The purchase of items inconsistent with furtherance of the GCPS' mission.
 - Any purchase prohibited or unauthorized by the purchasing card procedure adopted by the Superintendent.
- Expenditure Limits
 - \$5,000 for each transaction with a maximum of \$30,000 per month.

4. PURCHASING ETHICS

All funds held by the Gwinnett County Board of Education and its local schools, regardless of the source, are held in public trust. As a result, Gwinnett County Board of Education employees will approach all purchasing and procurement decisions as responsible stewards of public funds.

Gwinnett County Board of Education employees shall not engage in unethical behavior or compromising practices in relationships, actions and communications with present or potential suppliers. Further, Gwinnett County Board of Education employees shall avoid the intent and appearance of unethical behavior or compromising practices in relationships, actions and communications with present and potential suppliers.

Gwinnett County Board of Education employees or consultants are expressly prohibited from soliciting, demanding or accepting directly or indirectly, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with the following:

- Approving, disapproving, recommending, or preparing any part of a program requirement or purchase request;
- Influencing the content of any specification or procurement standard, rendering of advice, investigation, or audit;
- Awarding a contract.

Any Gwinnett County Board of Education employee who observes or suspects unethical behavior in the procurement of goods or services should report that behavior to the following individuals or offices, as appropriate under the circumstances:

- The individual's supervisor, or
- The Internal Audit Department, or

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- The Director of Purchasing, or
- The Division of Human Resources, or
- The Superintendent's Office, or
- The Board of Education.

5. UNAUTHORIZED PURCHASES

It shall be prohibited for any employee to purchase or contract to purchase any goods or services, or to make any contract within the provision of this policy other than through the officials named in this policy. If any purchase is made contrary to this policy, the Board shall not be bound thereby.

Purchasing Procedure

Level: Procedure Accompanying

Policy: DJE Descriptor Code: P.DJE

Rescinds July 2, 2021 Descriptor

Term: Purchasing Effective Date:

September 8, 2021

GENERAL PURCHASING INFORMATION

These procedures shall apply to all acquisitions involving the expenditures of Gwinnett County Public School funds or funds provided from other sources, (Federal, State, Local, Grants, etc.) for the use of Gwinnett County Public Schools. The purchase of goods and services required by various departments or schools which derive support wholly or in part from the Gwinnett County Public School System shall be in accordance with the purchasing procedures as presented herein.

The Director of Purchasing, acting under the authority granted by the Board through the Superintendent, is responsible for the purchasing of materials, supplies, equipment, or services and goods as may be required for efficient/timely operations of the school system. Others designated with purchasing authority are as follows:

1. The Chief Operations Officer of Facilities and Operations, acting under the authority of the Board through the Superintendent, is authorized to secure bids and enter into contracts for construction projects, maintenance, repair, and daily operation of school system facilities. While acting under this authority, the Chief Operations Officer of Facilities and Operations is bound by all rules, provisions, and dollar limitations imposed by the Board or the Chief Financial Officer. The Contracts Engineer in the Facilities and Operations Division will act as a Purchasing Agent for issuing and awarding designated contracts within the approval limits as specified in this Procedure and Policy
2. Program Budget Managers are permitted to request payment (Payment Request – PeopleSoft) for items or services which do not have an approved purchase order or contract. These requests will be approved or disapproved by the Director of Purchasing or a designee, based on the merits of the
3. Those school system employees permitted use of purchasing cards are authorized to purchase items within the limits as specified in Procedure DJEB "Purchasing Card."
4. Principals/Program Budget Managers are authorized to make purchases on behalf of the local schools/departments for non-equipment items with an aggregate value of \$5,000 or less per purchase.

All purchases will be in strict accordance with the policies established by the Board and the laws of the State of Georgia.

No personnel other than the Director of Purchasing or agents designated by the Director of Purchasing, as indicated above, are authorized to procure goods or services on behalf of the school system. Any purchase by persons other than a designated purchasing agent, as stated in the Board Purchasing Policy DJE "D-Fiscal Management," shall not be binding on the Board.

Regardless of the potential contract amount, technology spends related to the hosting of GCPS student or employee data with a third-party or contractor requires the execution of FERPA and Data Privacy and Security Addendum during the contracting process. RFP and RFI process for evaluating vendors hosting such data requires the use of the Third-Party Cybersecurity Questionnaire.

USE OF FUNDS

School District Budgeted Funds

1. Budgeted funds are approved based on the assumption that instructional materials, services and other items are needed for use during a current fiscal year. It is not intended that these budgeted funds be obligated for the purpose of carrying funds over into a new budget year or for the accumulation of a stock of supplies. Obviously this rule calls for reasonable interpretation and application. Capital Projects are budgeted across multiple years and it is expected that, until completion, obligations for these projects would carry over into future fiscal
2. Budgeted funds must not be used to purchase items that are gratuitous in nature such as:
 1. Gifts or Gift Certificates (Local schools are allowed to make these purchases, but must follow the guidelines established in the Local School Accounting Procedure DIA)
 2. Flowers, food or beverages for meetings, parties, recognition or in sympathy
 3. Personal memberships or subscriptions
 4. Office décor
3. Purchases must be in accordance with current Policy DJE "Purchasing," Procedure PDJE "Purchasing" and Procedure PDJEB "Purchasing "
4. Expenditures must be charged to a Budget line that coincides with the type of goods/services being purchased shown on the invoice. Inappropriate coding effects reporting of financial data to the State of Georgia which may impact school district funding.
5. Purchased services must always be fully explained (including dates of service, service performed and by whom). If this information is not provided by the vendor, the program budget manager or local school administrator is responsible for providing this information prior to

Local School Funds

Local funds are generated at the local school level and classified under the following categories: athletics, student services, community services, general funds, student instruction, maintenance & operation, staff development, grants, media, flow through and scholarships. All local school funds are considered to be restricted with the exception of the general funds, which are not restricted but must be used for appropriate school expenditures. The primary responsibility rests with the principal to ensure that local funds are utilized to support the general welfare of the school staff and student body.

Local funds are expended by issuing a local school check to a vendor or using the purchasing card. Items may also be ordered on a PeopleSoft requisition, printing requisition, or check request and charged to a reimbursable code. No payments are to be made from cash receipts.

CONFLICT OF INTEREST

Gifts, Rebates, Personal Gain from Outside Sources

1. GCPS employees shall not accept a gift, favor, loan, reward, political contribution, gratuity, entertainment, transportation, lodging, or meals from students, parents or potential suppliers who conduct business with GCPS except those of nominal value (less than \$50.00), which must be disclosed to the immediate supervisor and the Department of Internal Audits. Advertising items and instructional products that are widely distributed may be
2. GCPS employees are expressly prohibited from soliciting from any present or potential supplier (person, company, firm or corporation) the right/privilege to purchase goods or services for personal use at prices offered the School system through bids and/or
3. In the event a company provides unsolicited incentive type gifts with the shipment of an order, the items should be turned over to the Purchasing Department for disposition. Disposition will be as follows:

- Items which have no bearing on school business will be disposed of in the best interest of the school

~~Skip To Main Content~~ can be instructionally utilized will be forwarded to requesting school.

4. GCPS employees shall not have goods ordered from a P-Card or purchase order using any GCPS funding source delivered to their personal

PURCHASING REGULATIONS

Purchases of all equipment, materials, supplies, services, rents and leases shall be based on sound business practices. Digital Bids, Request for Proposals, Oral Phone Quotes, State of Georgia Contracts, General Services Administration Contracts, Georgia Department of Education Regional Cooperative Educational Service Agency Contracts, recognized public oriented Purchasing Cooperative or Consortium and applicable bids by local County Government Agencies (county governments & school districts) shall be used when appropriate to purchase goods and services. Requests for Proposals may be used when the use of competitive sealed bidding is either not practicable or not advantageous to the School System. Generally, a Request for Proposal will be used when Gwinnett County Public Schools (GCPS) lacks expertise in formulating detailed specifications for the product or service needed or when the service being purchased does not lend itself to a set of specific specifications.

Selection Criteria

1. All purchases shall be based upon acquisition of goods and services at the lowest cost while being best suited to meet GCPS'
2. Vendors are at liberty to quote on alternative competitive products and services when a particular brand or model is specified, provided items quoted are fully compatible and of equal or better quality as determined by GCPS. However, the use of brand or model specifications for bidding purposes is discouraged. Brand/Model specifications will only be used when GCPS does not have the expertise to develop the appropriate technical specifications for bidding. If it is necessary to use a brand/model specification, then a written justification must accompany the bid request.
3. Vendors are placed on notice that lowest price alone will not be the sole determining criteria in the selection
4. GCPS reserves the right to award purchases on an individual item or combined item basis, whichever is in its best
5. The school system will evaluate suppliers based on the quality of goods or services provided, the number of shipments/services that were within the time frame specified, the degree to which the vendor/supplier meets the customer's expectations and the cost of the goods or

Purchases That Require Competitive Quotes or Bids

Acquisitions of all goods and services shall be subject to and must be made in accordance to the following limits, with the exception of those items listed below as "Purchases That Do Not Require Competitive Bids":

1. Purchase of items with a total estimated value of \$25,000 or less shall be made at the lowest possible cost. One or more written or electronic commerce quotations should be obtained to determine the best
2. Purchase of items with a total estimated value of \$25,001 to \$100,000 requires two or more written or electronic commerce
3. Purchase of items with a total estimated value of \$100,001 or more shall be made from existing bids or upon two or more sealed bids. State law requires competitive sealed bids for purchase of items and construction contracts totaling \$100,000 or
4. In the event of an emergency or potential work stoppage the Superintendent, Chief Financial Officer, or Director of Purchasing shall, within approved limits, authorize purchases through use of informal quotations or other appropriate methods that are in the best interest of the school system. Such purchases shall be made only from budgeted and available

All bid awards made by the Board or its agents are final as agreed to in the bid terms and conditions. However, suppliers/vendors may address an appeal to the Director of Purchasing. Based on the judgment of the Director of Purchasing the award may be rescinded, modified, or new bids accepted if it is considered to be in the best interest of the school system. The Director may recommend to the Chief Financial Officer such action be taken, provided award letters have not been released by the Purchasing Office, a purchase order has not been released, or a contract has not been signed.

Purchases That Do Not Require Competitive Bids

The following items, regardless of amount, shall be purchased upon approval by the Director of Purchasing or a designated purchasing agent:

1. Textbooks, films, slides, video materials or other items, newspapers, library books, reference materials, subscriptions, computer software or other instructional media from the publisher, distributor, or agent. (See State Board of Education Rules for specific details for the purchase of)
2. Tests and test scoring services of a standardized examination from the publisher or licensed
3. Agreements for maintenance service from the original vendor or authorized agent of the installed equipment or products if the same cannot be competitively
4. Continuance of an existing purchase agreement, bid, request for proposal, time and material contract, rent, lease or purchase order duly authorized by the Board of its

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5. Additional purchase of like equipment, material, supplies, services, rentals or leases previously approved may be made provided the additional order is at the same or less price. Contractual provisions can be made to provide an inflation/deflation mechanism for price adjustments based on the Consumer Price Index or Producer Price Index for commodities or
6. Items from an existing contract or bid from another local, state, or federal governmental agency, or from a recognized public oriented Purchasing Cooperative or
7. Sole Source: Purchases from the only known source or sole distributor may be made within approval limits, provided a reasonable and diligent search has been conducted for other possible
8. Single Source: Purchases from a single source may be made within approved limits, per board policy, provided a reasonable justification has been made and

Electronic Commerce /Electronic Signatures

Purchasing processes are approved for electronic commerce transactions, including electronic approvals and signatures that are within approval limits described in this policy.

Decentralized Purchasing - Local Schools/Departments

A local school principal/program manager or his/her designee may purchase supplies, materials, and services that involve no more than an aggregate sum of \$5,000. Aggregate purchases in excess of \$5,000 must be approved in writing by a purchasing agent. The only exceptions to this approval process will be checks issued over \$5,000 from a flow-through account, student activity account, or a scholarship account. Equipment purchases made in excess of \$999 must be processed by the Purchasing Department.

Food items will be purchased, from approved bids, by the individual School Nutrition Program Managers for delivery to their various schools.

At the local school level, purchases from employees are allowed up to the \$5,000 limit (\$999 for equipment) provided the local school principal specifically approves the purchase, maintains documentation that the price is competitive with other suppliers, and the employee involved is not part of the purchasing decision.

Purchase (Procurement) Card Purchases

The GCPS purchasing card system shall be administered under the Director of Purchasing. Purchase cards issued by the school district are the only authorized credit card approved for use by local schools, departments and program budget managers. Purchases with the card should be of such a nature that the Purchasing Department cannot add value to the process by coordinating the purchase. Procedure P.DJE "Purchasing" provides basic limitations and general restrictions. Specific procedures in requesting, uses and accounting for the purchasing card may be found in Procedure P.DJEB "Purchasing Card."

Procurement Approval Requirements

1. Purchases from budgeted funds in the amount of \$5,000 or less for any item or group of items shall be made with the approval of the Department Head, Principal or any employee who has been issued a procurement card, once procedural requirements are
2. Purchases from budgeted funds for any item or group of items with a value of \$5,001 to \$25,000 shall be made by a purchasing agent designated by the Director of Purchasing or by the Director of Purchasing, once procedural requirements are met.
3. Purchases from budgeted funds for any item or group of items with a value of \$25,001 to \$100,000 shall be made by a purchasing agent designated by the Director of Purchasing or by the Director of Purchasing, once procedural requirements are met.
4. Purchases from budgeted funds for any item or group of items with a value of \$100,001 to \$500,000 shall be made by the Director of Purchasing upon approval of the Chief Financial Officer, once procedural requirements are met.
5. Purchases from budgeted funds for any item or group of items with a value of \$500,001 to \$1,000,000 shall be made by the Director of Purchasing upon approval of the Superintendent, once procedural requirements are met.
6. Purchases from budget funds for any item of group of items exceeding a value of \$1,000,000 shall be submitted to the Board for approval.
7. Contracts for Facilities and Operations capital projects from budgeted funds with a value up to \$500,000 shall be made by the Chief Operations Officer once procedural requirements are met. Change orders to existing Facilities and Operations contracts may be approved by the Chief Operations officer up to \$250,000 and by the Superintendent up to \$1,000,000. Any change orders in excess of \$1,000,000 must be approved by the Board of
8. Emergency purchases, above \$1,000,000 or which have not been provided for in the budget, may be made if critical to the continued operation of the school system upon approval by the Superintendent. Such action shall be reported to the Board of Education at its next regularly scheduled

The same policies, rules and regulations and approval limits apply to negotiated contracts.

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Exhibit I: DCSD Division of Operations: Vacant Positions

CESO's discussions with DCSD consistently revealed that the significant staffing shortage within the Operations Division has an impact on the overall work environment. This issue was a frequent point of discussion during interviews and meetings.

At the time of this assessment, the Operations Division shared a list of positions that were vacant within the Division. The list, dated 11/19/2024, is included on the following four pages.

EXHIBIT I

DCSD Operations Division: Vacant Positions - 11/19/2024

Facility Maintenance	# of Alotted Positions	# of Positions Filled	# of Remaining Vacancies
Supervisor III, Skilled Trade	10	7	3
Painter, Lead Facilities	2	1	1
Painter	17	11	6
Plumber	16	9	7
Attendant, Pest Control	3	2	1
Carpenter	17	15	2
Electrician	15	13	2
Worker, General Maintenance	20	15	5
Manager I, Kitchen Equipment	1	0	1
Manager I, Evening Shift	1	0	1
Manager I, Business Operation	1	0	1
Worker, Small Equipment Repair	2	0	2
Generator Technician	2	1	1
Roofer	6	4	2
Technician II, Audio/Visual	7	4	3
Technician II, Mechanical Ctrl	5	2	3
Clerk III, Purchasing Card 752	2	0	2
HVAC Mechanic/Technician	26	22	4

Custodian, 12 M - Train Crew	5	2	3
Kitchen Equipment Mechanic	5	2	3
Facility Manager III*	2	0	2
Facility Manager I*	2	0	2
HVAC Manager III*	1	0	1
HVAC Manager II*	1	0	1
HVAC Supervisor*	3	0	3
Custodial Manager III*	1	0	1
Custodial Manager I*	1	0	1
Skilled Trade Supervisor*	1	0	1
Call Center Manager I*	1	0	1
Business Services	# of Alotted Positions	# of Positions Filled	# of Remaining Vacancies
Logistic Technician	8	7	1
Accounting Analyst III	1	0	1
Printer/Binder	4	3	1
Business Manager I	1	0	1
Regional Transportation Specialist	6	5	1
Project Specialist	3	2	1
Delivery Driver	14	12	2
School Nutrition	# of Alotted Positions	# of Positions Filled	# of Remaining Vacancies
Area Compliance Supervisor	1	0	1

Claims Revenue Specialist	1	0	1
Purchasing Technician	1	0	1
Records & Accountability Clerk	1	0	1
Skilled Trade Supervisor	1	0	1
Technology Specialist	1	0	1
Marketing & Menu Specialist	1	0	1
Manager Training Wellness & Sustainability	1	0	1
Fleet	# of Alotted Positions	# of Positions Filled	# of Remaining Vacancies
Fleet Data Clerk	1	0	1
Fleet Shop Ops Manager 1	2	1	1
Fleet Shop Supervisor II	3	2	1
Service Advisor	4	3	1
Lead Bus Technician	6	2	4
Bus Technician	46	23	23
Body Technician	2	0	2
Mechanic Helper	4	1	3
Transportation	# of Alotted Positions	# of Positions Filled	# of Remaining Vacancies
Routing Technician	10	7	3
Customer Service Representation	2	1	1
Assistant Transportation Supervisor	12	8	4
Transportation Supervisor	21	20	1

Dispatch Clerk	6	4	2
Totals (as of 11-19-24)	340	211	129

**New Positions*

