

**Joint City Schools Facility Investment Task Force Recommendations – Progress statements  
as of July 2, 2018**

#	Key Observations	Recommendations	Page #	Responsible Party	Status	Progress Description
<b>Capital Planning and Implementation Subcommittee</b>						
1	Alexandria lacks a unified and distilled vision for the future.	We recommend Alexandria define its “Targeted New Reality” to clarify priorities for decision making when considering how best to deliver capital projects and services.	Pg. 13	City Council/School Board	In process	Through visioning sessions, the City Council and School Board will establish a framework for future collaboration and decision-making which will inform the Targeted New Reality.
2	The City and ACPS have a tendency to jump to capital solutions rather than explore broader options to deliver services (“capabilities”).	We recommend the City and ACPS jointly develop and implement a ‘Capability Delivery Model’ to assist City Council and the School Board with determining how best to deliver services to the residents of Alexandria.	Pg. 14	City/ACPS CIP development staff	Early brainstorming	Staff will collaboratively create a capability delivery model to assess all capital projects, not limited to facilities. In order for the model to work most effectively, it is likely that collaboration between departments on assessing capital needs, establishing the definition and criteria for required capabilities and how to measure them will need to occur prior to proposing capital budgets. Endorsement of this collaboration will need to be given by ACPS and City leadership. At this time, a model would not be able to be fully implemented for the upcoming FY 2020-2029 CIP budget cycle, but could be developed and implemented by the FY 2021-2030 CIP budget cycle.
3	The CIP process lacks joint City and ACPS vision, collaboration, coordination, and execution.	We recommend that a Joint Capital Management Council be formed to oversee the operation of the Capability Delivery Model and capital allocation process.	Pg. 16	City Manager and ACPS Superintendent	In process	City Manager and ACPS Superintendent have started meeting with some members of their team and discussing implementation of Task Force recommendations, and will establish a formal group including themselves and necessary senior staff. The intent of this group is to review and make final determinations on proposed budgets after staff have collaboratively applied the capability delivery model and developed a preliminary prioritization of funds. The group will be formalized over the summer and review draft proposed CIPs from all departments, including ACPS, in late summer or early fall, prior to the Superintendent’s Proposed CIP.
4	The CIP process provides a fragmented view of capital needs citywide.	We recommend the City and ACPS develop long-term Joint Facilities Master Plan to provide a comprehensive, integrated, citywide view of Alexandria’s capital needs.	Pg. 17	City: Planning & Zoning, Department of General Services, Procurement ACPS: Operations, Procurement	Early brainstorming	Funds were allocated in both the City’s and ACPS’s CIPs to conduct a Joint Facilities Master Plan. Decision criteria and guiding principles established in the previous and a subsequent vision session(s) will be used to define a framework for the scope and execution of developing this plan. Joint staff will begin to develop the scope of the Joint Facilities Master Plan over the summer; however, more direction is anticipated from Council and the School Board in a subsequent vision session.
5	The current budget cycle lacks sufficient time to deliberate on capital needs and proposed project solutions.	We recommend that the City and ACPS consider revising the budget calendar to decouple the annual operating and annual capital budgeting cycles in order to provide adequate time and resources to review, engage, and make capital decisions.	Pg. 19	City/ACPS CIP Development Staff	In process	Staff from the Office of Management and Budget have begun working on drafting a proposal to potentially implement this change. ACPS Finance and Operations staff have discussed this change with City staff and potential impacts which need to be considered. Any change will not likely begin until the FY 2021-2030 CIP budget cycle.
6	The 10-year duration of the CIP makes it challenging to provide the same rigor of analysis for all projects, apply prioritization criteria equitably and clearly, and manage expectations cycle to cycle.	We recommend that City Council consider changing the way it reflects projects within the CIP. When a certain level of rigor is met, individual projects and their associated funding amounts should be identified. However, when project assumptions are more speculative, projects should be reflected within contingency accounts so that expectations can be more adequately managed.	Pg. 20	City/ACPS CIP Development Staff	Early brainstorming	As recommended by the Task Force, a contingency fund for major capital projects was included in the FY2019-2028 CIP. The intent is for projects that are more speculative be reflected within this account. With an established capability delivery model, CIP development staff can better determine the readiness of projects and more accurately reflect them within the CIP. As the model identifies those projects that are increasingly ready to proceed and whose cost and schedule estimates become firmer, the CIP can be adjusted accordingly, setting realistic expectations for project implementation.
7	Implementation practices largely focus on the management of individual projects rather than as programs within a citywide portfolio, therefore limiting the yield of benefits that standardization and interconnectivity could provide.	We recommend the City and ACPS employ “best in class” project, program, and portfolio management practices to maximize the return on investments and meet strategic objectives.	Pg. 20	City Department of General Services, Alexandria Fire Department and ACPS Operations staff, City/ACPS Procurement staff	Early brainstorming	City and ACPS staff will begin conversations to jointly develop a standardized process for managing the citywide portfolio. ACPS and City Procurement staffs will develop criteria that meet the needs of both entities so that all future contracts may be shared.

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<b>Alternative Delivery Methods Subcommittee</b>						
<b>8</b>	Traditional practices, a ‘business as usual’ culture, and ‘silos’ within our city have stifled innovation, which we believe has resulted in missed opportunities for high-impact solutions for designing and delivering citywide capabilities and projects.	We recommend that leadership proactively challenge traditional practices and methods for capital project and service delivery by exploring new best practices to keep Alexandria competitive and attractive to potential partners and developers. This includes embracing opportunities such as public private partnerships, joint use, co-location, shared municipal services, adaptive reuse, and others as identified.	Pg. 28	City and ACPS Leadership to develop; all departments to implement	In process	As part of the FY 2019 City budget, a new public-private partnership (P3) position in the City Manager’s Office was proposed to facilitate future public-private partnerships. This position would, among other duties, actively research and help implement alternative delivery solutions. Breadth of responsibilities would include collaborating with other agencies (P&Z, ACPS, AEDP, Procurement, etc.) and bringing their expertise to the table to help review, develop, negotiate and implement P3 operating and capital projects. City Council has requested additional information about this position before approving this proposal.
<b>9</b>	Creative and innovative solutions that have occurred are a result of ad hoc and reactive efforts rather than a cohesive, replicable process.	We recommend a framework and process be developed so staff are empowered to pursue alternative delivery of projects in a consistent manner. In order to develop this new framework and process, initiate a pilot project to serve as a model that can be modified and expanded over time.	Pg. 29	City and ACPS Leadership	Early brainstorming	Collaborative leadership will work to develop a framework of expectations for how projects, capital and otherwise, are pursued and explored to achieve the best possible outcomes. The high school capacity project will serve as a pilot project of this process as it will be collaborative between City and ACPS departments from start to finish. The project will also define the capability of how students can best be served , and explore all options rather than assuming a specific capital project.
<b>10</b>	Existing city and private resources have not been consistently or adequately leveraged, which has limited the return on investment of projects to date or the ability to effectively launch new efforts.	We recommend that adequate resources be identified to support and expand citywide technical expertise so that efforts can be coordinated, informed, and executed strategically. These resources include direction and commitment from leadership, leveraging existing groups such as Alexandria Economic Development Partnership, and new staff, systems, and access to specialized consultants.	Pg. 30	City Council/School Board; City and ACPS Leadership	In process	The proposed addition of the public-private partnership (P3) position in the City Manager’s Office (see #8 above) to look at these options would commit added resources to these efforts. ACPS has increasingly utilized the Alexandria Economic Development Partnership (AEDP) and will continue to do so. Continued commitment by leadership to support delivery alternatives will further the development of P3 solutions.
<b>11</b>	Civic engagement is critical, but should not be treated as a substitute for strong leadership by elected representatives.	We recommend leadership ensure that current civic engagement policies and practices focus on the public becoming well-informed champions of citywide issues while providing input on individual projects. Leadership must remain transparent in decision making and feel empowered to choose solutions that are best for all of Alexandria.	Pg. 32	City Council/School Board	Early brainstorming	The City Council and School Board may want to use a future visioning session to apply the decision criteria to develop a new or edit/implement the existing framework established in the City’s Civic Engagement Policy for all City and ACPS processes. The finding presented by the Task Force indicates that civic engagement may be the most or one of the most significant decision criterion in the decision making process. Following clear direction on how City Council and School Board intend to consider civic engagement in the decision making process, staff can draft a joint civic engagement framework and define its place in the capability delivery model, CIP development cycle and project implementation processes.

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<b>Maintenance and Operations Subcommittee</b>						
<b>12</b>	There is no standardization of capital asset data between the City and ACPS that would allow for a comparison of asset conditions.	We recommend the City and ACPS identify a common set of objectives and requirements for asset data for use in facilities planning, maintenance, and operations.	Pg. 40	City: Department of General Services, Fire Department, Procurement ACPS: Facilities and Procurement	In process	Staff concluded that it is not critical for both entities to use the same system, but that it would be beneficial to evaluate all facilities and to establish common data definitions (for data sharing) in a like manner for comparison and consistency. The collaborative staffs will continue to work to ensure that facility evaluation is consistent and objectives are aligned.
<b>13</b>	DGS, ACPS, and AFD have three different work order tracking systems with varying and often limited capabilities for preventive maintenance scheduling, which creates inefficiencies and lacks standard performance outcomes.	We recommend DGS, ACPS, and AFD establish a common, cost-effective approach to track and manage preventive maintenance needs, either by enhancing an existing system(s) or selecting a new system that meets the collective needs.	Pg. 42	City: Department of General Services, Fire Department, Procurement ACPS: Facilities and Procurement	In process	See response to 12.
<b>14</b>	Existing staffing levels and other resources are strained and rely on vendors to inform and complete the majority of preventive maintenance work.	We recommend the City and ACPS identify optimal staffing levels, structures, and resources for maintenance and operation needs with strategies for how best to provide that capability. Seriously consider and adopt a plan to expedite deferred maintenance, similar to WMATA's SafeTrack program.	Pg. 43	City: Department of General Services, Fire Department, Procurement, Office of Management and Budget ACPS: Facilities and Finance (includes Budget and Procurement)	In process	ACPS's recent Facilities Audit also recommended some of the changes suggested by the Task Force. Some organizational structure changes are being implemented. Staff need to determine if this will be part of the Joint Facilities Master Plan, or part of a separate plan to accompany the Joint Facilities Master Plan, to outline an expedited program for deferred maintenance in alignment with major capital modernizations. ACPS's and the City's annual facility budget process would be the annual opportunity to identify needed maintenance resources, as well as determining the staff/contractor mix.
<b>15</b>	There is inconsistency in the level of standards and specifications that inform project design and construction between City and ACPS, which in turn can impact maintenance and operations.	We recommend the City and ACPS develop, implement, and regularly update design guidelines and specifications and standard operating procedures that meet lifecycle goals and objectives.	Pg. 45	Department of General Services, Alexandria Fire Department, ACPS Facilities	Early brainstorming	Staff will compile an inventory of all standards and specifications. Any gaps determined and opportunities to share will be identified. Having similar or the same design standards may offer opportunities for future sharing of maintenance contracts.
<b>16</b>	Procurement manages a broad and diverse workload, which creates challenges in focusing time and efforts on capital project and maintenance and operations actions.	We recommend the City and ACPS identify and implement ways to increase procurement resources and efficiencies, including the feedback loop between procurement and technical staff, expanding best value negotiation options, shared service agreement opportunities, and other new approaches for executing and coordinating procurements.	Pg. 47	City/ACPS Procurement staffs	Early brainstorming	Staff has begun discussions to determine how to take advantage of expanding joint processes, ensure additional future procurements are reviewed by both parties, and are more written for joint use.