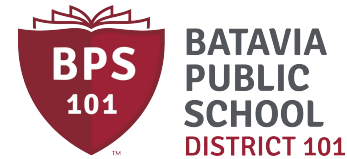


Introductions

Scott Mackall, designation. Role: Moderator
- Director of Educational Services, GSF-USA



Anton Inglese, PhD, SFO. Role: Speaker
- CFO, Batavia USD 101



Mark Anderson, designation. Role: Speaker
- Director of Operations, Batavia USD 101



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Session Overview

- **Objective:** Understand the step-by-step process for smoothly transitioning custodial services.
- **Key Topics:**
 - Rationale for early vendor replacement
 - Legal & contractual considerations
 - Communication strategies
 - Selecting and onboarding the new vendor
 - Ensuring continuous cleanliness during the transition

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Why Replace Mid-Year?

- **Performance Issues:** Poor quality of service, unmet contractual obligations
- **Safety & Compliance:** Failure to meet health or safety regulations
- **Financial Concerns:** Budget overruns or hidden costs
- **Organizational Changes:** Shifts in district needs or policies

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Legal & Contractual Considerations

- **Review Existing Contract:**
 - Termination clauses
 - Notice requirements
- **Obtain Legal Counsel:**
 - Potential for damages or legal disputes
 - Liability protections
- **Document All Issues:**
 - Evidence of subpar performance
 - Communication logs with the vendor

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Communication Strategy

- **Internal Stakeholders:**
 - Board of Education and Administration
 - Principals and school staff
- **External Stakeholders:**
 - Parents and community members
 - Current vendor contacts
- **Consistent Messaging:**
 - Timeline for changes
 - Impact on students and staff
 - Assurance of service continuity

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Selecting a New Provider

- **Clear Criteria:**
 - Experience in K–12 environments
 - References and track record of service quality
- **Bid & Evaluation Process:**
 - Invitation for Bids (IFB)
 - Evaluation committees and scoring rubrics
- **Due Diligence:**
 - Site visits, proof of insurance, background checks

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Onboarding & Transition Plan

- **Phase-Out Procedures:**
 - Equipment and supplies handover
 - Staff exit protocols
- **Phase-In Procedures:**
 - Training sessions on school policies
 - Scheduling regular check-ins and walk-throughs
- **Timeline & Milestones:**
 - Clear start/end dates for old and new vendors
 - Contingency measures if unexpected issues arise

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Cleanliness & Disruption

- **Staff Coverage:**
 - Temporary labor or internal support if needed
- **Inventory Control:**
 - Ensure supplies and equipment remain stocked
- **Health & Safety Monitoring:**
 - Maintain consistent sanitation standards
 - Communicate updates on cleaning protocols

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Monitoring & Accountability

- **Performance Metrics:**
 - Daily checklists and regular evaluations
 - Response times for repairs or spills
- **Feedback Loop:**
 - Open channels for principals, teachers, and staff
 - Formal review meetings with vendor leadership
- **Continuous Improvement:**
 - Address minor issues before they escalate
 - Schedule periodic contract reviews

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Key Takeaways

1. **Preparation is Critical:** Legal, contractual, and logistical groundwork must be in place.
2. **Communication Matters:** Keep all stakeholders informed throughout the process.
3. **Plan for Continuity:** Ensure day-to-day operations remain unaffected.
4. **Set Clear Expectations:** Clear performance metrics and accountability structures.
5. **Evaluate & Adjust:** Ongoing feedback leads to continuous improvement.

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Resources & Contacts

- **Legal Counsel:** District's legal team for contract review
- **District Operations Guidelines:** Check for your Board policies on contracts and vendor management
- **Industry Best Practices:** IASBO PDCs, regionals, peer districts

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Questions and Answers

We thank you for your time!

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Presenters

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