

NOVEMBER 1993

Texas School Performance Review PROGRESS REPORT Part II

STATUS OF RECOMMENDATIONS

JOHN SHARP
Texas Comptroller
Of Public Accounts



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The Texas School Performance Review

State Comptroller's Office

P.O. Box 13528

Austin, Texas 78711

1-800-232-8927



November 17, 1993

The Honorable Ann W. Richards
The Honorable Bob Bullock
The Honorable Pete Laney
Members of the 73rd Legislature

Ladies and Gentlemen:

I am pleased to present part II of the Texas School Performance Review (TSPR) Progress Report.

Part I of this report presented an overview TSPR's efforts to date. This report, Part II, summarizes each of the nearly 1,000 recommendations made so far by TSPR, and provides a brief report on their implementation status.

Together, these two volumes represent a "scorecard" for TSPR's efforts, and I'm proud to say that the results have been more than worthwhile. TSPR is intended to help improve the efficiency and effectiveness of school district operations. To date, we've reviewed 11 Texas school districts and produced literally hundreds of recommendations to streamline business operations, cut administrative costs, manage money better and improve program offerings. Those 11 districts have adopted about three-quarters of TSPR's recommendations, whole or in part, and have already realized actual savings of nearly \$25 million. Millions more in savings should result in the next few years.

Part II also contains a summary of our "key recommendations." These proposals address problems and opportunities that are shared by virtually *all* school districts we have reviewed. We believe that most Texas school districts could use some form of these recommendations to improve their own management practices and operations.

TSPR is continuing its efforts. My office has recently announced upcoming reviews of five more school districts. But we realize that, in the final analysis, it's up to the districts themselves to make the kind of changes needed to provide the best possible services in today's changing and uncertain financial climate. These changes require leadership and a good deal of will; they're not made without some pain. TSPR applauds the districts that have already made these efforts, and is ready and willing to help others.

Sincerely,

JOHN SHARP
Comptroller of Public Accounts

Texas School Performance Review

PROGRESS REPORT

Part II

Table of Contents

Introduction	v
Key Recommendations	vii
Austin ISD	1
Calhoun County ISD	51
Cherokee ISD	85
Dallas ISD	89
Lake Travis ISD	153
Lubbock ISD	161
Richland Springs ISD	175
San Antonio ISD	179
San Saba ISD	189
San Saba County-wide Issues	193
Victoria ISD	195
West Orange-Cove CISD	211

Texas School Performance Review PROGRESS REPORT Part II

Introduction

The Texas School Performance Review (TSPR) is intended to improve the efficiency and effectiveness of Texas' school districts by identifying common management problems and finding innovative solutions.

TSPR was created as a result of Senate Bill 1, approved by the Texas Legislature in 1990, which asked the State Comptroller's office to conduct an ongoing series of management reviews of Texas school districts. Comptroller John Sharp has hired management consulting firms to conduct the actual reviews, under the guidance of Comptroller education specialists. The review effort began in 1991, with initial studies of the San Antonio, Richland Springs, San Saba, Cherokee, Lubbock, Victoria, West Orange-Cove Consolidated and Lake Travis Independent School Districts. In 1992, TSPR completed its review of Dallas ISD; reviews of the Austin and Calhoun County ISDs followed in 1993.

Since its inception, TSPR has made nearly a thousand recommendations touching on virtually every area of school district operations. These recommendations promise to provide the 11 school districts reviewed with more than \$85 million in savings over several years. Actual savings resulting from TSPR recommendations already total nearly \$25 million.

This progress report has been divided into two parts. Part 1 provides an overview of TSPR's recommendations by operational area and discusses selected recommendations that have been adopted, as well as some that have not. Part 1 also highlights innovative managerial policies and programs developed by school districts themselves, and provides a contact list of personnel in school districts reviewed by TSPR, as well as TSPR's consultants.

Part 2, the present volume, contains two major sections. The first discusses TSPR's "key" recommendations—recommendations

of general application that TSPR believes can improve virtually any school district's operations. TSPR hopes that school districts will study these recommendations and use them to create their own self-examination and improvement processes.

Part 2 also details every individual TSPR recommendation by school district, and provides capsule summaries of their implementation status. Information on implementation was obtained from the districts. Detailed background information on each recommendation is available in the TSPR reports for each school district. Copies of these reviews may be obtained by calling TSPR at (800) 232-8927; a nominal fee is charged for these reports.

The detailed recommendation listing is organized by school district. Abbreviations used are:

- A Austin
- CC Calhoun County ISD
- C Cherokee ISD
- D Dallas ISD
- LT Lake Travis ISD
- L Lubbock ISD
- R Richland Springs ISD
- SA San Antonio ISD
- SS San Saba ISD
- SSCW San Saba County-wide
(issues applicable to San Saba,
Richland Springs and Cherokee ISDs)
- V Victoria ISD
- W West Orange-Cove CISD

Within each district's listing, recommendations are organized by operational areas, as presented in TSPR's original report on that district.

TSPR recommendations have been categorized as "intact"—a recommendation adopted or in the process of adoption in its original form; "modified"—a recommendation

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adopted in altered form, and “not implemented”—a recommendation either rejected or not yet acted upon by the district. Some recommendations have not been implemented due to inadequate financial resources,

a change in the circumstances surrounding the issue or a misunderstanding on the part of TSPR’s reviewers. In most cases, however, TSPR stands by its recommendations, while respecting the districts’ right to disagree.

Key Recommendations

TSPR's performance reviews have identified a number of recurring recommendations that can have broad application to problems and opportunities faced by most school districts. TSPR believes that these recommendations can provide any district with a valuable tool for self-assessment.

District Organization and Management

Examine the school district's organization to ensure its maximum efficiency.

TSPR has found that major improvements in efficiency often can be gained by modifying a district's organization. TSPR evaluates organizational structures based on several different factors; basic questions to be asked include:

- Are district functional activities aligned in a way that reflects the organization's overall mission?
- Does the organizational structure enhance communication among similar functions?
- Does the organizational structure promote specialization within each functional area?

TSPR reviewers recommend organizational schemes that consolidate responsibility for the performance of each function and promote simple, clear chains of command, with a minimum number of approvals needed for any administrative action. The reviews also examine administrators' span of control, to determine whether managers have too many responsibilities to manage effectively.

Conduct strategic planning for every aspect of the school district.

To adequately plan for the future and clearly define important goals, TSPR has found that school districts often must establish or refine a formal strategic planning pro-

cess. These plans must be clearly understandable to all district personnel and have specific and realistic long- and short-term objectives. Strategic plans and objectives should be updated annually to reflect changing circumstances and allow for the monitoring and evaluation of planned activities.

Link performance measures in the strategic plan to the district budget.

TSPR has found that linking performance measures identified in the strategic plan to the budget builds an important element of accountability into the process. While many district expenditures are state or federally mandated, districts still are responsible for making the best possible use of their funds. Moreover, by setting goals and measuring progress toward them, the district creates a factual basis for its decision making that can be used to justify its actions to the community.

Educational Service Delivery

Evaluate educational delivery programs.

Evaluations of performance effectiveness and efficiency should not be limited to business operations. TSPR reviews recommend that school districts implement effective evaluations of educational programs, processes and curricula. School districts should identify short- and long-term goals and success factors for the enhancement of student achievement.

Examine curriculum and instruction management structures.

TSPR has found that school districts often can improve the efficiency of educational programs by making changes in curriculum and instruction management structures. Districts should strive to streamline this area so that its efforts can be concentrated solely on its prime mission—educating students.

TSPR believes that these performance reviews can provide any school district with a valuable tool for self-assessment.

Balancing the competing factors of economy, performance and state-mandated student-teacher ratios presents a challenge for nearly every school district in Texas.

Personnel Management

Provide adequate staffing.

The typical school district spends about 75 to 80 percent of its total budget on personnel. For this reason, personnel management, including recruitment and hiring practices, is a major focus of TSPR's review process.

Scarce resources often force districts to make hard decisions concerning staff reduction and redistribution. TSPR recognizes that balancing the competing factors of economy, performance and state-mandated student-teacher ratios presents a challenge for nearly every school district in Texas, and seeks to assist districts in identifying adequate staffing levels to support their programs.

Keep accurate and timely personnel records.

TSPR recommends that districts examine their salary administration and job classification systems to ensure that they feature complete, accurate and timely job descriptions. School districts should maintain adequate systems for application tracking, position control, salary administration, performance appraisal, appraisal tracking and analysis, grievance tracking and analysis, benefits administration and the maintenance of employee histories.

Adequately train staff and evaluate their performance.

Continuing training is desirable at all levels of the school district's organization. TSPR weighs the adequacy of training programs and looks for innovative ways to hold training costs to a minimum.

Performance evaluations are critical both for teaching and support staff. Goal setting and measurement provide a basis for fair evaluations of employee performance, as well as for the development of a training plan that adequately meets individual needs and aspirations. Feedback from an evaluation process should provide employees with a clear picture of their strengths and weaknesses and encourage them to seek the training they need to move toward their goals.

Community Involvement

Establish effective communication with the local community.

To be effective in their educational missions, school districts must be able to respond to the needs of students, parents, taxpayers, area businesses, local governments and various

other special-interest groups. TSPR often recommends that a school district enhance its working relationship with the local community.

Community advisory committees are one commonly recommended mechanism for improving two-way communication between the district and the community; such committees allow the district to learn more about community needs and give area residents a feeling of pride and "ownership" in the district. Community volunteer efforts also should be encouraged to provide school districts with a useful pool of free talent, and to strengthen ties between districts and their communities.

Facilities Use and Management

Make the most efficient use of district facilities.

With increasing student populations and other changing needs, school districts must find ways to make the most of the space they have and adequately plan for their future needs. TSPR recommends that districts prepare and maintain a master plan to guide their long-range facilities development. School districts should monitor the management, financing and control of construction projects for maximum effectiveness.

Maintain preventative maintenance plans for district facilities.

TSPR recommends that school districts implement effective preventative maintenance plans, scheduling programs and work-order management information systems. As a part of this effort, school districts should develop maintenance standards and performance evaluation criteria. Districts should work to ensure that labor and equipment use and assignment is cost-effective. Maintenance services and service levels should be appropriate to individual district requirements.

Asset and Risk Management

Sell unused school district real estate.

When a district owns real estate for which it has no planned use, assets are tied up that could be used for construction, repairs and renovation of useful properties. External factors such as market conditions often complicate the decision to sell. For this reason, long-term district investments should be reviewed regularly to determine optimum sale times. If sale is not an option, districts should seek other solutions, such as alternative uses, prop-

erty trades or the leasing of unused properties to outside entities.

Develop an effective risk-management program that protects students, employees and the district.

Risk management involves the identification and analysis of risk factors, the creation of plans for reducing risks and the provision of insurance against risk. TSPR studies the effectiveness of district risk-management systems, including their employee safety, environmental safety, loss-control and worker's compensation components. District insurance costs and other spending are directly affected by the effectiveness of these programs.

Some districts have opted to self-insure all or part of their employee insurance coverage, while others prefer to offer commercial benefit packages. As a part of its reviews, TSPR examines the adequacy and cost of each district's insurance coverage and identifies any gaps in coverage that could place the district at unnecessary risk. For districts that have chosen to self-insure, TSPR reviews costs, adequacy of reserves and risk factors and compares the arrangement to coverage from an outside carrier. In the case of districts that have purchased coverage from outside, the review focuses on identifying the best coverage at the lowest possible price, and compares existing coverage with self-insurance options.

Maximize investment yields while minimizing risk.

TSPR has found that only the largest school districts maintain sufficient cash reserves to invest independently in high-yield financial instruments such as repurchase agreements. Most districts tend to place excess cash in local certificates of deposit; a few districts have depository contracts that lock in higher yields in times of falling interest rates. TSPR consistently recommends that districts consider placing funds in TexPool, an investment pool for public funds managed by the State Treasurer, which offers most school districts greater liquidity and higher yields than they can obtain independently.

Financial Management

Provide adequate internal controls and an effective internal audit program.

Internal control measures are intended to ensure compliance with applicable laws and

regulations and the reliability of district financial and operating data, and to identify opportunities for potential improvement. Every school district should maintain adequate internal controls and an effective internal-audit function that periodically reviews all operations that use district resources. Critical areas should be reviewed annually, and findings reported directly to the superintendent and the district board.

Purchasing

Improve the bid process to obtain the highest-quality goods at the lowest possible price.

TSPR has found that, by tightening their bid processes, many districts can realize significant savings and improve the quality and delivery of goods and services. One way in which this can be accomplished is through a centralized purchasing office that coordinates district-wide bidding. Another successful approach involves the critical reexamination of service contracts' terms and conditions, to identify areas where additional controls can be added and opportunities for shared savings can be negotiated. Periodic re-bidding of contracts to compensate for economic and environmental changes also has generated considerable savings.

General District Operations

Maximize the impact of support staff through improved work management, production control and training.

Support services, such as maintenance, custodial services, food services, transportation and security, all are necessary to effective educational delivery. In each of these areas, TSPR focuses on the critical functions of scheduling, work management and work prioritization, production controls and training. Work management and prioritization systems increase employee productivity and reduce duplication of effort. Production standards and controls streamline work flows and remove "road blocks." Effective training encourages productivity improvement as well as personal development on the employee's part.

Document and update all policies and procedures.

Written policies and procedures are vital in all areas of school district management, including personnel management, food service, transportation, purchasing, investment and account-

TSPR has found that by tightening their bid processes, many districts can realize significant savings and improve the quality and delivery of goods and services.

ing. Written documentation helps the district clearly understand exactly what it wishes to accomplish, and outlines the most efficient and effective steps to accomplish that goal. Written procedures also provide the basis of useful measurement and evaluation tools.

Maintain accurate statistical measures of past performance to plan for future needs.

TSPR focuses on information gathering as a basis for planning. Support areas, such

as maintenance, custodial services, food services, transportation and security required accurate historical information to schedule preventative maintenance, plan for equipment replacement and budget costs based on projected enrollment. Reliable performance information helps districts avoid increased costs due to ill-informed, last-minute decision making.

Austin ISD

Period of TSPR review: 10/92-2/93

Consultant: Deloitte & Touche

Estimated savings from TSPR recommendations: \$9,329,000

Rec #	Recommendations	Implementation Status	Comments
Governance and Administration			
A.1	<p>Initiate a structured, three-month strategic and tactical planning process to prioritize strategies and objectives in AISD's strategic plan. Achieve consensus among the board and administration concerning the district's:</p> <ul style="list-style-type: none">- Governance roles and responsibilities- Strategic goals and objectives- Tactical plans to achieve goals and objectives- Performance measurement criteria and methodologies- Performance monitoring and reporting <p>Establish an ongoing planning process to link strategic plans to annual plans and budgets.</p>	Not Implemented	<p>The board did not approve a \$25,000 expenditure related to this recommendation. However, the board and administration are working on prioritizing objectives from the strategic plan through the budget process. On February 1, 1993, the board adopted priorities from the strategic plan that will be reflected in the budget and other functions of the district. Rather than a structured, three-month planning process, AISD feels this effort should be included in annual updates of the strategic plan. AISD administration currently is planning such an update.</p>
A.2	<p>Modify the district's budget development process to ensure that:</p> <ul style="list-style-type: none">- the annual budget reflects AISD's strategic priorities for the year, and budgeted resources are allocated to achieve those priorities.	Intact	

Rec #	Recommendations	Implementation Status	Comments
	<ul style="list-style-type: none"> - the budget calendar facilitates the adoption of a final preliminary budget based on state-mandated programs and minimum expected funding levels, at least eight weeks prior to the end of the fiscal year. This will allow other critical district processes, such as teacher hiring, to be planned and executed in a timely and orderly manner. - the budget document is revised to present information which is helpful in analysis. - a zero-based budgeting approach is adopted to encourage the evaluation of programs and departmental requests for funding. 		
A.3	Develop and implement a standardized format for board agenda items that provides board members with adequate information on which to base their decisions.	Intact	Such a format already exists and is used in preparation of the board agenda. However, staff will be more diligent about including information in agenda items and providing adequate information on which to base decisions.
A.4	Provide for an annual goal-setting session at which the board communicates its expectations for the superintendent during the upcoming year, as well as an annual performance appraisal session at which the superintendent is evaluated based on his or her accomplishment of the board's expectations.	Intact	The board and superintendent have held two executive session meetings in which expectations for the superintendent were outlined and an improvement plan established. These meetings, held on January 12, 1993 and March 29, 1993, are part of the superintendent's annual performance evaluation.
A.5	Develop an orientation session for new board members to help familiarize them with the district and their duties.	Not Implemented	The board did not approve a \$1,000 expenditure that would have provided training for newly selected board members.
A.6	Implement a committee structure for the Board of Trustees. Standing committees would enable the full board to use its time more effectively, as routine items and issues requiring research could be handled at the committee level.	Not Implemented	AISD believes a better approach is to establish <i>ad hoc</i> committees to study pertinent issues.

Rec #	Recommendations	Implementation Status	Comments
A.7	Establish an in-house legal counsel to handle the district's routine legal matters.	Intact	Prior to TSPR's review, the district had taken actions to restrict the number of personnel with access to outside counsel. As a result of TSPR's recommendation, the district is hiring a staff attorney, although certain legal issues will remain with outside firms.
School Management			
A.8	Make various modifications in the district's organization to improve coordination among functions and broaden certain managers' span of control.	Intact	School management has been restructured into four areas, each with an area superintendent and director, for an annual cost savings to the district of \$105,000.
A.9	Evaluate resources dedicated to the Priority School program to determine their cost-effectiveness and impact. High-cost, low-impact components of the Priority School program should be reconsidered in light of the conclusions of the study conducted by the district's Office of Research and Evaluation (ORE).	Not Implemented	The district contends that resources provided to priority schools should remain at current levels.
A.10	<p>Conduct a review of AISD's site-based management. Plan for the delegation of additional responsibilities and authority to campuses. Planning activities should include:</p> <ul style="list-style-type: none"> - reviewing the program's current implementation status. - identifying problems and successes in the implementation process. - researching successful site-based management programs in other districts, through research or site visits. - assigning specific responsibility for the oversight and evaluation of site-based management, to ensure accountability at the campus level. 	Intact	The district believes that this process should be the ongoing responsibility of the area assistant superintendents of Operations. The district has been engaged in site-based management for only one full year (some campuses have been involved longer through an initial pilot program). The review of this process will be continuous and use indicators of student achievement as accountability tools. Self-assessment by campus leadership teams will be an integral part, as well as assessment by peers from other campuses.

Rec #	Recommendations	Implementation Status	Comments
A.11	Combine the district's campus improvement planning (CIP) process and school-based budgeting process into one comprehensive plan for schools. Each spring, conduct campus improvement planning and budget development for the next school year.	Intact	Every campus principal, the campus leadership team and selected faculty members have been trained in writing campus improvement plans and their integration into local budgets. This training included specifics on the preparation of a local budget given the new flexibility available.
A.12	Develop and implement an annual training program for principals and bookkeepers on central-office practices and procedures, including accounting, budgeting and purchasing. These sessions should contain general information as well as updates on specific procedural changes.	Intact	
A.13	Review available resources for staff-development efforts and develop a mechanism to identify staff-development needs throughout the district. Investigate opportunities to participate in more extensive staff-development programs provided by other organizations, including local businesses, at little or no cost.	Intact	The district is creating a staff-development academy which would coordinate the district's efforts with those of the Texas Education Agency (TEA), the Region 13 education service center, local universities and other local agencies. In support of this recommendation, the board approved a \$320,000 expenditure in the 1993-94 budget.
A.14	<p>Develop a program to identify and train current employees to become principals. This should be accomplished through a structured organizational development and succession planning process that:</p> <ul style="list-style-type: none"> - identifies potential candidates for principalship. - provides a formal counseling and career planning process. - determines educational and training programs to meet developmental needs. - provides mentorship, coaching, counseling and career progression assessment. 	Intact	Although this process previously was done on an informal basis, the area assistant superintendent for Operations now formally identifies potential principal candidates in the district. This pool will be counseled to seek higher education and other requirements for principalship. A component of the staff-development academy will be developed specifically for this program.

Rec #	Recommendations	Implementation Status	Comments
Curriculum Services			
A.15	Group externally funded district components together in one department, to ensure better communication among grant administrators and compliance with state and federal laws and regulations.	Not Implemented	The district does not concur with this recommendation, and instead is considering repositioning the vacant positions of director of Special Programs and secretary to the director to the Professional Development Department. AISD also is considering transferring coordinators of gifted/talented and early childhood programs to Curriculum and Programs.
A.16	Conduct an intensive resource-requirement analysis that compares required workloads to existing resources. This project should include the Curriculum Services Department, the Special Education Department and the State and Federal Programs Department. Use the results of this project to identify areas that can be streamlined or that need additional central-office administrators.	Not Implemented	<p>The district does not concur and instead is considering its own alternatives. These would include:</p> <ul style="list-style-type: none"> - using the expertise of Bilingual, Chapter 1, Technology and Early Childhood staff in making decisions regarding elementary education. - filling a coordinator of Language Arts position that is currently vacant. - filling a coordinator of Social Studies position that is currently vacant.
A.17	Review AISD's policy of providing multiple stipends to itinerant music teachers (teachers serving at more than one school). Decide whether these extra duties warrant multiple stipends, given the fact that other instructors with extra duties (such as bilingual and gifted and talented program instructors) do not receive similar stipends.	Not Implemented	The district has concluded that these multiple stipends are warranted.
A.18	Investigate whether the Science Health Resource Center could charge individual campuses for the use of its resources. Fees could be patterned after the Region 13 education service center's per-student fee.	Not Implemented	The district believes that its current practice in this regard is cost-effective.

Rec #	Recommendations	Implementation Status	Comments
Special Education			
A.19	Reorganize the Special Education Department.	Not Implemented	
A.20	Conduct a resource-requirements analysis project of the Curriculum Services Department, the Special Education Department and the State and Federal Programs Department.	Not Implemented	
Special Projects			
A.21	Move the Gifted and Talented Program and the Early Childhood Program to the State and Federal Programs Department. Assign the textbook adoption and accreditation processes to the newly created position of director of Curriculum (formerly the executive director of Curriculum and Programs). The director of Curriculum will supervise the major content areas, including English/Language Arts, Math, Fine Arts, Secondary Language, Physical Education, the LRC/Media/Library and the Science Health Resource Center.	Not Implemented	The district has assigned the accreditation process to the director of Planning and Innovation. The district has assigned the textbook adoption process to the Department of Curriculum and Programs.
A.22	Conduct a resource-requirement analysis of the Curriculum Services Department, Special Education and the State and Federal Programs Department. Examine the need for additional Gifted and Talented administrators and a half-time early childhood bilingual specialist.	Not Implemented	<p>The district had recently performed a similar study and saw no reason to do another. They did agree that the program needs two additional coordinators—one for elementary and one for secondary—and at least one additional secretary. In addition, they feel they need a coordinator of co-curricular programs such as the following:</p> <ul style="list-style-type: none"> - Olympics of the Mind - Future Problem Solving - Elementary UIL

Rec #	Recommendations	Implementation Status	Comments
			<ul style="list-style-type: none"> - Middle School UIL - High School UIL - Academic Decathlon
A.23	Relocate the Gifted and Talented staff to the central office to foster better communication with other curriculum components.	Intact	<p>The district did <i>not</i> concur with the recommendation to add a half-time early childhood bilingual specialist. The district already has four bilingual administrators and one and one-half early childhood administrators.</p> <p>The assistant superintendent for Curriculum Support Services has asked the executive director of Curriculum and Programs to make necessary arrangements.</p>
State and Federal Programs			
A.24	Implement a central grant-writing function and clearinghouse for all AISD grant-writing efforts. The central grant-writing function would pursue competitive grants and coordinate the technical aspects of AISD's grant writing and grants administration, as well as grant research and cost budgeting for grants.	Modified	The board approved hiring additional coordinators for the grant-writing process. However, the district disagrees with TSPR's assumption that these coordinators would <i>save</i> the district \$2.5 million. Instead, the district feels the expenditure will attract supplementary funding. TSPR responds that this funding would supplant other district funding, which could then be used to upgrade AISD's educational system.
A.25	Review the district's grants administration process, implementing financial management and fiscal practices to ensure that grant funds are spent within the school year and in compliance with guidelines. This should involve streamlining the approval process for state and federal grant spending, and include a system to hold grants administration personnel accountable for missed opportunities and noncompliance with state and federal guidelines.	Intact	The district agrees with this recommendation but feels that state allocations of vocational funds should be made earlier in the school year. It is important to note that timely approval of applications and budget amendments by TEA are necessary to implement this recommendation.

Rec #	Recommendations	Implementation Status	Comments
A.26	Review the methods by which budgeted items are changed from one functional expenditure category to another, and implement measures to speed up the process. Ask TEA to allow the transfer of budgeted items below a minimum dollar amount from one category to another. AISD also could consider holding special board meetings to approve state and federal grant expenditures. These measures would speed up the approval and expenditure process for all changes in functional categories.	Intact	The district agreed that the transfer of funds from one functional category to another should be made more flexible. This also may require a change in TEA's Bulletin 679.
A.27	Include federal grant funds on the district's Purchase Requisition (PREQ) system to speed up the expenditure and procurement process.	Not Implemented	The board did not approve a \$10,000 expenditure that would have extended this system to all federal grants.
A.28	Reorganize the district and perform a resource-requirement analysis.	Not Implemented	See responses to A.15 and A.16.
∞ A.29	Include Bilingual, Vocational Education and Chapter 1 staff in AISD's vertical team meetings to facilitate better communication among campuses and the central office and to ensure that educational service delivery is applied evenly across the district.	Intact	Staff liaison roles have been assigned to vertical teams.
School Support			
A.30.A	Review and modify the department's organizational structure. - Prioritize program efforts to target particular student populations without overlap.	Intact	AISD is analyzing its services by type and target population. The district has begun tracking students who receive services; this will allow program managers to determine which students receive multiple services and what degree of overlap exists.
A.30.B	- Focus program efforts to maintain administrative strengths.	Not Implemented	The district did not agree with TSPR's findings.

Rec #	Recommendations	Implementation Status	Comments
A.30.C	- Reduce the department director's span of control.	Intact	The district has included a position in its current budget with primary responsibility for the supervision of all counselors (including the at-risk counselors) and visiting teachers and the management and monitoring of the district's at-risk grant.
A.31.A	Review and modify department staffing to reach suggested staffing ratios.	Not Implemented	After comparing Austin ISD with seven large districts around the state and three surrounding districts (Round Rock, Eanes and Georgetown), AISD believes its staffing formulas are similar to the others'.
A.31.B	- Hire an additional 20 nurses and an additional nurse administrator.	Modified	<p>The district will increase nursing time on a site-based needs-assessment basis, rather than by ratio only.</p> <p>AISD did not agree to add an additional nurse administrator and offered an alternative plan to address span-of-control issues. This system will provide for area "nurses-in-charge." One nurse per area would receive additional responsibilities, including staff appraisal; the nurse administrator would maintain ultimate responsibility for evaluations. The position would feature a stipend for its advanced responsibilities and a reduced campus assignment within the area.</p>

Rec #	Recommendations	Implementation Status	Comments
A.32	Coordinate safety, liability and security issues with the district's risk manager.	Intact	District staff will review AISD's emergency plans. Campus crisis plans will be coordinated and tracked with emergency plans, where appropriate. The district will ensure that each school has a copy of the district's crisis intervention handbook. AISD's ten visiting teachers will continue working with campus administrators to tailor the handbook for use on their campuses. Community Education will coordinate any safety classes offered with the risk manager by informing him of class offerings and accepting recommendations on how to increase participation by AISD staff and students.
A.33	Implement an automated system to provide centralized health records for all students containing medical alert information, medicine taken by students, special education health information, immunization data and vision and hearing information.	Not Implemented	The district agreed that, while development of this system carries an initial cost for design and implementation, a long-term savings of professional time would result. However, the board did not approve a \$25,000 expenditure to support this recommendation.
A.34	Become a Medicaid provider and receive reimbursement for services currently provided. Medicaid federal funds would replace 60 percent of AISD general funds currently used to provide physical, occupational and speech therapies and other health services to Medicaid-eligible children.	Not Implemented	The district presented detailed information indicating that additional administrative costs involved in becoming a Medicare provider would negate any savings to the district.
A.35	Review the content of community education courses for overlap and compatibility with classes offered through Austin Community College and the University of Texas. Drop courses that duplicate those offered by other resources or that lack educational value.	Not Implemented	AISD did not agree with this recommendation.

Rec #	Recommendations	Implementation Status	Comments
Student Athletics and Extracurricular Stipends			
A.36	Consolidate and focus Athletic Department budgeting. Combine the interscholastic and Burger Center budgets. Create a budget summary of all three budgets, including gate receipt projections, for inclusion in the district budget document. Reclassify laundry-fund money as an operating expense rather than a capital outlay.	Intact	During the budget process, the Burger Center and Interscholastic budgets were combined into a single Interscholastic Budget. The laundry-fund budget will be properly assigned.
A.37	Include the salaries of Athletic Office personnel in the district-wide job classification and compensation study.	Intact	Salaries of personnel in the Athletic Office have been included in the district-wide job classification and compensation system.
A.38.A	Move functions not directly related to training student athletes to departments outside of the Athletic Department. Rely upon central administration functions to gain economies of scale and savings in the following ways:		
	- combine warehousing and delivery functions of the Athletic Department with the central warehouse and delivery system.	Not Implemented	The district maintains that this consolidation would require extra personnel, vehicles and space.
A.38.B	- use Service Center custodial staff to clean the central stadiums and field house, groom playing fields, remove graffiti, fix toilets, replace lights, resurface and paint parking lots, and mark, line, fertilize, water and mow playing fields. This would reduce overtime costs associated with athletic events, as more flexible scheduling could be accommodated by the Service Center.	Not Implemented	AISD has rejected this recommendation, citing scheduling difficulties.
A.38.C	- require the Finance Department to account for gate receipts and equipment purchases. The Athletic Department should have a petty cash account with \$500 for emergency purchases, set up as recommended in the Accounting recommendations. The Internal Audit Department should perform a regular audit of gate receipts and finances from the three central athletic sites.	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
A.38.D	- require the Personnel Department to hire game workers and incorporate their personnel files in the computer system.	Not Implemented	This item was not implemented due to potential scheduling difficulties. However, the district agrees that Personnel should set up game personnel files on the computer system.
A.39	Perform an annual inventory of school athletic equipment to improve coaches' accountability for and control of athletic equipment.	Not Implemented	This is presently being done by each sport coach without verification by principals or the Athletic Department. This district maintains that overtime, part-time help or additional personnel would be required to verify 25 secondary-school athletic inventories for all sports.
A.40.A	Review the amount and number of stipends.		
	- Limit the number of middle-school football coaches stipends per school to two. Limit the number of high school football coaches' stipends per school to six.	Not Implemented	
A.40.B	- Compare AISD's number of duty days and stipend amounts to state averages.	Not Implemented	The district maintains that the majority of its athletic stipends are below state averages.
A.40.C	- Reevaluate the length and need for extended contracts.	Not Implemented	
A.40.D	- Evaluate coaching pay scales.	Not Implemented	AISD maintains that its coaches' pay scale is appropriate.
A.40.E	- Reevaluate district policies for distributing coaching experience stipends.	Not Implemented	The district stated that this was a contract agreement in place when its coaches were hired, and will cease when the coaches leave the district.
A.41	Evaluate coaches' teaching loads for content, student-teacher ratios and number of classes taught. Career-ladder compensation should depend upon teaching a required number of classes containing state-defined "essential elements." Require all coaches to teach five classes. Consider eliminating for-credit interscholastic athletic practices.	Modified	All coaches except the athletic director have been required to teach five classes. The district did not agree to eliminate for-credit interscholastic classes.

Rec #	Recommendations	Implementation Status	Comments
A.42	Return all revenues over projected levels from gate and concession stand receipts to the general fund. Require all Athletic Department maintenance needs to be prioritized with other district needs.	Not Implemented	The district stated that projections are not made to create excesses but rather to compensate in case of seasons that fail to produce expected revenues.
Hiring and EEO			
A.43	Determine staffing formulas by March 1, 1993 to facilitate hiring and personnel decision making.	Intact	Board-approved staffing formulas for 1993-94 were presented in budget assumptions at the March 1, 1993 board meeting.
A.44	Initiate efforts to define requirements for and implement a new human resources information system. With respect to hiring and EEO, consider implementing an automated substitute-teacher placement and tracking system.	Not Implemented	A new payroll personnel system was developed several years ago but AISD has been unable to implement it due to inadequate CPU capacity. Further study must be completed in conjunction with the recommendation to study the payroll system. AISD also has investigated computerized substitute-teacher systems. Available systems could be purchased and installed within a six-month period. However, the board did not approve a \$90,000 budget item that would have supported this recommendation.
A.45	Hold biweekly orientations for new AISD employees. This orientation session should cover topics such as employee benefits, personnel policies and a brief overview of district operations, and provide time for new employees to complete required forms for their personnel files. An orientation session would help the Personnel and Benefits departments complete new employee personnel files more quickly and efficiently. The district also should consider placing portions of the orientation on videotape to reduce staffing requirements associated with the sessions.	Not Implemented	The district did not approve a \$5,000 line item in the budget that would have supported this recommendation. New employees usually attend summer orientation sessions.

Rec #	Recommendations	Implementation Status	Comments
A.46	Create written staffing and budget policies giving more authority to campus leadership teams. These policies should outline principals' ability to remove employees from their campus, and clarify the teams' ability to "exchange" positions for more funds or vice-versa.	Intact	Done.
A.47	Track campus recruiting efforts and perform a cost-benefit analysis and prioritization of recruiting activities.	Intact	AISD currently summarizes recruiting and hires by college, but the system is not always timely enough to impact the next year's recruiting efforts. The district will institute a more formal process for tracking recruitment and hiring for planning purposes.
A.48	Monitor turnover rates for specialized positions and create formal exit-interview procedures to identify issues and ideas for retaining employees in difficult-to-fill positions.	Not Implemented	AISD did not feel that a formal exit interview would enhance their ability to retain staff.
A.49	Consider using a public job-service bureau for hiring classified positions, such as custodians or food-service workers. Job-service bureaus would perform initial screenings and reduce the district's paperwork.	Not Implemented	AISD feels that public job-service bureaus couldn't handle the number and diversity of positions within the district.
A.50	Train or retrain all staff who conduct interviews in the use of SRI techniques. Make a standardized interview instrument available to all interviewers.	Not Implemented	AISD feels that SRI interview techniques are excellent, but that principals would be unlikely to use these skills often enough to maintain competency in them. The cost of SRI training is approximately \$2,500 per person, or \$250,000 for all district principals.

14

Performance Assessment

A.51	Implement a job classification, evaluation and salary administration system appropriate for the district's new organization, including complete and accurate job descriptions.	Intact	This activity is under way, but additional funding may be needed to complete the project.
A.52.A	Review and modify policies and procedures to: <ul style="list-style-type: none"> - create a system that identifies schools needing additional appraisers and qualified appraisers who can assist those schools. 	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
A.52.B	- modify career-ladder placement data and the district's appraisal instrument to collect information on teaching load and curriculum content.	Not Implemented	
A.53	Actively support the Commission for Educational Excellence's recommendation that effectiveness indices be incorporated into the TTAS for appraising teachers and that a similar system be developed for administrators. These indices would be based on differences between observed and predicted student achievement scores. Also consider a commission-recommended training plan tied to performance evaluations.	Not Implemented	The district has stated that this decision needs considerably more study.
A.54.A	Modify AISD's appraisal system to: - create incentives for staff continuing education, such as a tuition reimbursement program.	Not Implemented	Although tuition reimbursement would be a positive incentive, AISD feels its current fiscal environment precludes such a program.
A.54.B	- create a separate appraisal instrument for classified employees with professional or administrative duties.	Intact	Done.
A.54.C	- integrate administrative criteria into supervisory appraisal instruments that encourage supervisors to complete appraisals for classified employees.	Intact	AISD plans to make completion of subordinates appraisals a stronger criteria in supervisors' own appraisals.
A.55	Implement a new human resources information system. Computerize the classified appraisal system to speed forms transmission to the Personnel Office and add sums correctly.	Not Implemented	The board did not approve a \$90,000 expenditure for this system.

15

Personnel Policies, Procedures and Records

A.56	Perform a resource-requirements analysis for the Personnel Department to determine appropriate staffing and compensation levels, in line with other large school districts.	Not Implemented	The district would welcome a management audit of the Personnel Department but cannot justify its \$50,000 cost at this time.
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Rec #	Recommendations	Implementation Status	Comments
A.57	<p>Place responsibility for the following functions with the Personnel Department:</p> <ul style="list-style-type: none"> - maintaining complete and accurate job descriptions. - creating and maintaining personnel files for all district employees. - creating supplement pay records. - performing net salary calculations. - tracking leave and vacation entitlements. - completing employment verifications. 	Modified	<p>These functions are performed in Personnel for professional employees and many classified workers. This proposal raises the issue of whether these functions should be performed for some special groups of employees, such as lunchroom monitors and athletic game help. AISD still is weighing this recommendation.</p>
A.58	<p>Define requirements for a new human resources information system that can adequately meet user needs. With respect to personnel policies, procedures and records, the following features should be considered:</p> <ul style="list-style-type: none"> - Position control with interface to the budget system - Maintenance of employee histories for trend and historical analysis - Salary calculation capabilities - Automation of classified personnel and substitute teacher records 	Intact	<p>A new payroll personnel system is nearly complete. The system needs to be analyzed to determine whether further development is appropriate. However, the current CPU may prevent implementation of this system. A budget expenditure connected with this recommendation was not approved by the board.</p>
A.59.	<p>Review and modify policies and procedures to ensure:</p>		
A.59.A	<ul style="list-style-type: none"> - the maintenance of personnel records in waterproof and fireproof areas. 	Not Implemented	
A.59.B	<ul style="list-style-type: none"> - the creation of a system to purge personnel files and notify employees to pick up purged items. 	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
A.59.C	- development of a checklist to standardize documents contained in classified employee personnel files.	Not Implemented	
A.59.D	- microfilming of personnel records of terminated employees.	Not Implemented	
A.59.E	- preparation of a complete listing of summer school programs and personnel each spring.	Not Implemented	
A.59.F	- elimination of accident-leave benefits, to ensure that employees do not receive more money on leave than they would make while working.	Intact	The board eliminated accident leave for the 1993-94 school year, for an expected annual savings of \$80,000.

Employee Relations

A.60	Improve AISD's coordination of employee relations.	Intact	AISD has instructed the director of Employee Relations and the coordinator of Employee Relations (Classified) to develop a formal process to exchange and coordinate information concerning their functions. This will include information exchanges on complaints, grievances and disciplinary actions.
A.61	Create a procedure to formally track all grievances filed within AISD, including grievances settled at level 1. Use the monitoring system to identify problems with school administrators, certain jobs, etc.	Intact	AISD has changed its grievance forms to include a requirement that copies of all grievances, appeals and responses be sent to the director of Employee Relations and coordinator of Employee Relations (Classified).

Rec #	Recommendations	Implementation Status	Comments
A+ Coalition			
A.62	<p>Work with the A+ Coalition board to improve communications and establish common goals and objectives. This process could be initiated by scheduling an executive meeting or a series of work sessions to be attended by representatives of both boards to discuss problems that are preventing a beneficial working relationship.</p>	Intact	<p>AISD is implementing the following actions:</p> <ol style="list-style-type: none"> 1. All trustees are invited to participate in all A+ Coalition board, executive committee and steering committee meetings. 2. Every member of the A+ Coalition executive committee is to be paired with a trustee for the purposes of information sharing and consensus building. 3. The A+ Coalition has established a collaboration momentum team that will work with AISD's Board of Trustees to establish a common philosophical base related to the district's strategic plan.
A.63	<p>Consider coordinating services between the A+ Coalition and other educational support functions seeking outside funding, to improve potential funding opportunities. Fully use the resources the A+ Coalition may be able to offer, including expertise in:</p> <ul style="list-style-type: none"> - obtaining grants - establishing technology plans - implementing strategic objectives for programs, budgeting, etc. <p>This process could be initiated by scheduling a high-level meeting between appropriate representatives to discuss departmental strategic objectives and goals, financial opportunities and constraints and other relevant issues.</p>	Intact	<p>The following actions have been implemented:</p> <ol style="list-style-type: none"> 1. The coalition currently consists of 42 member organizations, including the district and Adopt-A-School. In addition, the district has issued a standing invitation to these organizations' staff members to attend A+ Coalition board meetings. 2. The various coalition momentum teams are working on critical programs including Accountability, Site-Based Improvement, 100-Percent Graduation, Communications, New Generation Schools, Collaboration and Professional Development. 3. The coalition has established the Austin Public Education Foundation to generate revenue to support activities and programs aligned with the district's strategic plan.

Rec #	Recommendations	Implementation Status	Comments
Adopt-A-School			
A.64	<p>Consider coordinating services between the Adopt-a-School Program and other educational support functions seeking outside funding, to develop contacts that could be economically and operationally beneficial to the district. Because such departments employ different methods to accomplish their goals, their consolidation is not recommended. However, improved communication and cooperation could identify potential opportunities that are currently overlooked or neglected.</p> <p>This process could be initiated by scheduling a high-level meeting attended by appropriate representatives to discuss departmental strategic objectives and goals, financial opportunities and constraints and other relevant issues.</p>	Intact	<p>AISD initiated the following actions:</p> <ol style="list-style-type: none"> 1. AISD schools and programs will continue to recruit adopters to help meet the needs of the Adopt-A-School partnerships. 2. Members of the A+ Coalition and the AISD Board of Trustees sit on the Adopt-A-School board. The Adopt-A-School chairman sits on other community boards such as the A+ Coalition, the Austin Project and the Greater Austin Chamber of Commerce. 3. The Austin Adopt-A-School board has begun forming focus groups, organizing telephone surveys and holding panel discussions on the program's goals and future emphasis. This should help the Adopt-A-School program better coordinate and use available resources. 4. Incoming board members will reflect a broad cross-section of school, community and business representatives.
Communications			
A.65	<p>Develop and implement a media management training program to improve the ability of district personnel to communicate effectively with the media.</p>	Not Implemented	<p>This training can only be accomplished if other duties are reassigned.</p>
A.66	<p>Review the job activities and responsibilities of the director of Communication Services and determine if some of this position's tasks could be delegated to other positions within the district.</p>	Not Implemented	<p>A study that would have addressed this issue was not funded by the board.</p>

Rec #	Recommendations	Implementation Status	Comments
A.67	Eliminate Channel 8 and 28 programming and maintain a small staff to provide AISD with media production services.	Not Implemented	
Planning and Utilization			
A.68	Consider the possibility of consolidating AISD high-school student bodies and closing one school, with the option of re-opening it if and when enrollment trends warrant.	Not Implemented	The district maintains that its current efforts to reduce dropout rates will increase enrollment and make all its high-school facilities necessary within four years.
Construction Management			
A.69	Implement the district's strategic plan objective to develop and maintain an accurate inventory of existing facilities. This will require:	Modified	
A.69.A	<p data-bbox="373 754 1066 850">- a facilities audit and building inventory of each facility, to be used to identify each school's needs. The building inventory should include information such as:</p> <ul data-bbox="426 898 1066 1541" style="list-style-type: none"> <li data-bbox="426 898 646 922">• Equipment type <li data-bbox="426 962 678 986">• Fixed-asset number <li data-bbox="426 1026 867 1050">• Parts (i.e. belts, motors, filters, etc.) <li data-bbox="426 1090 1066 1153">• Operating characteristics (i.e. operating speed, electrical requirements, etc.) <li data-bbox="426 1201 1066 1265">• Primary structure (i.e., foundation, column and exterior, floor, roof, etc.) <li data-bbox="426 1305 1066 1369">• Secondary structure (i.e., ceiling, interior and partitions, windows, doors, etc.) <li data-bbox="426 1409 1066 1473">• Service systems (i.e., cooling, heating, plumbing, electrical, etc.) <li data-bbox="426 1513 678 1536">• Portable buildings 		<p data-bbox="1371 754 1976 978">The Maintenance Department is developing a computerized preventive maintenance program. Information on all building operating systems and equipment will be collected by Maintenance personnel and will become part of the program's database. This information also will become part of an overall building/facility inventory.</p> <p data-bbox="1371 1026 1976 1297">Management's staff in the Office of New Construction also is conducting a district-wide facilities evaluation for compliance with the American with Disabilities Act (ADA). However, the board did not approve \$50,000 to expand this effort to include collection of all other pertinent physical-plan information at each campus and facility site.</p>

Rec #	Recommendations	Implementation Status	Comments
A.69.B	Development and implementation of procedures for the periodic comprehensive inspection of district facilities by qualified, trained personnel. Use these procedures to evaluate each facility's functional and physical adequacy and to identify major repair and renovation priorities, potential safety hazards and energy conservation opportunities.	Intact	The district has prepared a plan for implementing these procedures.
A.70	Implement strategic objectives for the development and maintenance of a facilities master plan (FMP).	Intact	AISD has spent \$150,000 toward implementation of an FMP so far. An additional \$150,000 expenditure still required to support this project has not yet been approved. The effort will require the consolidation of a great deal of existing information into a common database and the computerization of facility drawings and related documentation. The computerized architectural drawings are being prepared.
A.71	Restructure the Management Construction Department. Make improved communication and coordination between the reorganized Plant Improvement Division and the Maintenance Department a top priority.	Intact	Done.
A.72	Hire a plant improvement engineer to oversee small contracts and survey district facilities.	Modified	The department plans to hire a third project manager to handle some of these duties. This is expected to further reduce the district's need for consultant services, producing a net savings of \$22,500.
A.73	Contract with an outside real estate agent to market and sell properties that AISD does not have targeted for use.	Not Implemented	AISD agrees with the recommendation, but has not yet been able to sell any of the properties in question.

21

Facilities Maintenance

A.74	Use data from the work-order tracking system to evaluate the status of current maintenance practices and develop value-added management information reports.	Intact	This process has been initiated and will be ongoing through weekly foremen's meetings.
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Rec #	Recommendations	Implementation Status	Comments
A.75	Perform activity-based analysis to evaluate the quality and cost-effectiveness of current maintenance activities.	Intact	AISD is analyzing specific maintenance tasks for cost-effectiveness and will produce appropriate recommendations. This process should improve the Service Center's ability to concentrate on the most beneficial maintenance-related services and identify activities that can be contracted more cheaply.
A.76	Perform trend analysis of completed work activities to improve AISD's maintenance planning and budgeting processes. Use this information to reduce inventories, enhance the purchasing and budgeting processes and tie staffing and training needs to work loads. Trend analysis also will assist in developing a more effective planned preventative maintenance program (PPMP).	Intact	Done.
A.77	Develop and implement work performance and material utilization standards for each shop to ensure efficient and cost-effective use of maintenance resources.	Not Implemented	
A.78	Develop and implement a training program for foremen and other appropriate staff to help them use the work-order tracking system to make their shops more productive and cost-efficient.	Not Implemented	
A.79	Improve the efficiency and effectiveness of the Maintenance Department by developing and implementing a PPMP for each shop and incorporating the program into the work-order tracking system.	Intact	A temporary programmer position has been funded and AISD is in the process of filling it. The district expects it will take about two years to fully implement a PPMP. Funding has not yet been approved to research and evaluate all of the data involved in implementation.
A.80	Implement a central receiving and integrated inventory tracking system for the Maintenance Department. Integrate the inventory system with the work-order tracking system to improve materials usage and control. Use the central warehouse for maintenance parts and materials storage, with satellite storage only at the maintenance facility.	Intact	A computerized inventory system exclusive to Maintenance is being developed. The district feels that this inventory system should be part of an overall inclusive system, but apparently believes this cannot be accomplished at present.

Rec #	Recommendations	Implementation Status	Comments
A.81	Conduct training for maintenance personnel on purchasing procedures and bid preparation.	Not Implemented	No action has been taken to implement this recommendation.
A.82	Review policies and procedures requiring blanket purchase orders to be re-initiated at the beginning of each fiscal year.	Intact	The Department of Finance has initiated changes in current procedures.
A.83	Consider contracting with the Texas Department of Criminal Justice for furniture and upholstery repair services.	Intact	This recommendation is under review by the supervisor of Buildings and Grounds.
A.84	Consider discontinuing the mobile electronics crew.	Not Implemented	
A.85	Implement training programs and requirements designed to facilitate state certification of building operators who volunteer for pest control duties. Investigate cost-effective ways to provide required services within existing resources, while minimizing costly overtime expenditures (such as flexible schedules, compensatory time, etc.).	Intact	All persons will be certified within the next 60 days. The district currently uses a flexible schedule to minimize overtime expenses.
A.86	Establish a hazardous chemicals storage facility using space currently available at the maintenance facility.	Not Implemented	The required planning and design of the storage facility has been completed, but the necessary funding is not available to proceed with the construction phase. All site work and utilities for the facility were completed as a part of new Service Center construction completed in June 1992.
A.87	Develop clear district policy definitions of maintenance versus plant-improvement activities. Consider relocating the Plant Improvement Division to the maintenance facility.	Intact	The director of Construction Management, supervisor of Plant Improvements and director of Maintenance will develop these definitions.
A.88	Establish policies and procedures to allow maintenance personnel to provide input on systems, equipment and material used for renovations and new construction.	Not Implemented	Current procedures consist of informal dialogues in which Construction Management staff members request opinions from Maintenance supervisors when considering major changes in materials, equipment or systems for new construction and renovations. In the future, this procedure will be formalized.

Rec #	Recommendations	Implementation Status	Comments
A.89	Develop, implement and enforce policies and procedures controlling access to schools and facilities, including controls on the production of keys.	Not Implemented	Development and implementation will require a collaborative effort by facility administrators, the Campus Police Department and the Maintenance division. Access to facilities will be a part of the proposed Campus Security Plan.
A.90	Restructure the Building Operator Division so that all building operators are assigned to a mobile crew, and each mobile crew is assigned to one of AISD's areas. Mobile crews could be based at one of the area secondary schools to minimize driving time and improve coordination. A trial program could be established to measure the effectiveness of such a structure.	Intact	AISD has researched several options to make the building operator program more equitable and efficient. During the 1993-94 year, however, building operators at the high-school level will continue to be assigned to individual campuses.
A.91	Expand and clearly define the roles and responsibilities of building operators, with an increased emphasis on preventative maintenance. Establish an effective training program for building operators to ensure they have the necessary skills to perform the maintenance assigned to them. This training could be accomplished using in-house personnel and resources.	Intact	The building operator's role will be a key element of the PPMP. Training for building operators in their redefined roles will be performed by Maintenance Department supervisors. Preventive maintenance activities will be implemented during development of the PPMP.

24

Housekeeping Services

A.92	Following completion of a district-wide facilities inventory, revise custodial staffing requirements and work schedules to more clearly define specific job tasks and performance expectations for each custodial position.	Not Implemented	This recommendation may be implemented in the future.
A.93	Develop and implement formal training programs and requirements for all custodians. Training for new custodians should be mandatory and should include effective custodial practices and work techniques, equipment and product usage, safety issues and an introduction to district policies and procedures.	Not Implemented	The district has proposed establishing a three-day training program including effective custodial practices and work techniques, equipment and product usage, safety and an introduction to district policies and procedures. However, the board failed to approve a \$5,000 budgetary expenditure for this training.

Rec #	Recommendations	Implementation Status	Comments
A.94	Conduct formal facility inspections on a routine basis.	Intact	A formal inspection program has been implemented. Each school will be inspected on a monthly basis (with the exception of December and May).
A.95	Encourage school administrators to employ Housekeeping Services personnel as technical advisors in facility inspections, custodial training, work-schedule development and the allocation of custodial supply budgets.	Intact	Done.
A.96	Establish a substitute custodian staffing program that includes development of a base service-level allotment for substitute custodians. This staffing system should incorporate coverage for vacations, sick days, personal days and other factors deemed appropriate. Fluctuations in substitute custodian usage could be moderated by encouraging early notification of vacation schedules and staggering vacations.	Not Implemented	In the future, AISD plans to assign substitute custodians to schools on a priority basis in cases involving vacancies, long-term absences, short-term absences, etc.

25

Risk Management

A.97.A	Review and modify policies and procedures to: <ul style="list-style-type: none"> - create a better preventive loss-control program, including a fixed-asset inventory and an identification tagging scheme for new equipment. Insurance could then be obtained on the actual contents of buildings rather than on an estimated percentage of book inventory. 	Not Implemented	A \$340,000 expenditure to implement a fixed-asset inventory system was not approved by the board.
A.97.B	- secure and obtain city permits for all portable buildings.	Not Implemented	All newly constructed classrooms now include security and fire alarm systems that meet city permitting requirements. The district feels that the cost of enhancing security for all existing portables would be prohibitive, unless it is included in a bond issue.
A.97.C	- alter the role of the Joint Insurance Committee to advisory-committee status.	Not Implemented	
A.97.D	- eliminate accident leave benefits.	Intact	

Rec #	Recommendations	Implementation Status	Comments
A.97.E	- establish a safety committee to coordinate and improve all aspects related to general safety in the district.	Intact	Risk Management now supports a Safety Advisory Committee whose membership includes representatives of the Campus Police, Food Service, Bus Transportation, the Service Center and classified personnel.
A.97.F	- process payments to the district's health insurance company and third-party administrator via electronic funds transfer, with proper documentation on file.	Not Implemented	AISD failed to see a compelling need to make additional investment in this area.
A.97.G	- coordinate the payment of refund checks for resigned and retired employees with the collection of money owed to the district.	Not Implemented	To implement this recommendation, substantial changes in the work flow of the Personnel, Payroll and Benefits offices would be required.
A.97.H	- rescind a board policy allowing athletic insurance to be purchased for participation in high school football, in order to equalize the insurance status of all sports. This would place the district in compliance with <i>Bertics v. Premont ISD</i> .	Not Implemented	The district feels that the prevalence of uninsured families and the risks inherent in football make it unwise to discontinue coverage for the sport.
A.97.I	- allocate funds for fire-alarm installation and replacement in the next bond issue, to bring these systems up to satisfactory condition.	Not Implemented	Although the district agrees with the concept, this recommendation is subject to a review of the district's overall facility needs at such time as a bond issue may be proposed.
A.97.J	- review district policies on benefits payments to part-time and temporary employees.	Not Implemented	AISD fears that a reduction in benefits might impair the district's ability to recruit and retain staff.
A.98	Hold employee orientations for new AISD employees on a bi-weekly basis. The orientation session should cover topics such as employee benefits and district personnel policies, and provide time for the new employees to complete required forms for their personnel files.	Not Implemented	The board did not approve a \$5,000 expenditure for this training.

Rec #	Recommendations	Implementation Status	Comments
A.99	<p>Transfer the following functions to the Personnel Department.</p> <ul style="list-style-type: none"> - Processing of wage-history inquiries and verifications of service for the Teacher Retirement System - Verification of paperwork such as retirement forms and I-9 forms - Establishment of electronic and paper personnel files for all employees 	Intact	<p>AISD concurs that the TRS Verification for Service (TRS 22), Notice of Final Deposit (TRS 7), and Certification of Non-Credit Compensation (TRS 19) should be completed in the Personnel Department.</p>
A.100	<p>Provide additional computer terminals to aid the Benefits Office staff in the efficient execution of work tasks.</p>	Intact	Done.
A.101	<p>Develop a risk-management manual and procedures manual and distribute them to all departments and schools.</p>	Modified	<p>The cost of developing a comprehensive manual is estimated at \$10,000, an amount that may not be justified in view of its prospective benefits. However, AISD found that the Texas Association of School Boards (TASB) has developed a loss-control manual which can be obtained at considerably less expense.</p>

27

Cash Management

A.102	<p>Reduce the total number of AISD bank accounts (other than activity funds accounts) to ten or less. Control all bank accounts from within the Finance Department, including the Athletic Imprest and Community Education accounts. Give the Cash Manager and Finance Department direct control over all district financial transactions. Transfer activity funds to a central bank for greater central control and accountability. Establish a system of petty cash accounts for all schools and departments at a central bank, to provide for emergency purchases.</p>	Intact	<p>AISD's number of bank accounts is being reduced during transition to a new depository bank cycle. Costs and savings cannot be determined at this time, and will depend upon the depository bid process and prevailing market interest rates. However, some funds are held in banks that have more than a simple banking relationship with AISD schools. For example, some schools have established accounts with banks that are adopters of their school, and thus enjoy fee waivers. Due to the far-reaching effects of this recommendation, additional time will be needed for analysis and meetings with affected individuals before any action can be initiated.</p>
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Rec #	Recommendations	Implementation Status	Comments
A.103	<p>Reassess the district's cash-management practices to determine the potential causes of high bank fees. Review items such as:</p> <ul style="list-style-type: none"> - Account structure - Failure to offset bank fees with previous months' surplus balances - Negative net balances in the payroll account - Ineffective cash management 	Intact	<p>All school districts are governed by Subchapter I, Chapter 23 of the Texas Education Code, The School Depository Act. The act requires all school districts to solicit bids for depository services in each odd-numbered year. This year, 1993, is therefore a bid year. All items recommended will be addressed in the analysis of bids received from submitting banks. Costs and savings cannot be determined at this time. These will depend upon the bid process and prevailing market interest rates.</p>
A.104.A	<p>Review and modify policies and procedures to:</p> <ul style="list-style-type: none"> - reconcile all bank accounts on a monthly basis. 	Intact	<p>This is already done. For some time, AISD has had bank reconciliations prepared within 30 days after receiving statements.</p>
A.104.B	<ul style="list-style-type: none"> - notify the district cash manager prior to the release of large payments, including all payment schedules. 	Not Implemented	
A.104.C	<ul style="list-style-type: none"> - create a system for identifying invoices with early discounts and credit terms. 	Intact	
A.104.D	<ul style="list-style-type: none"> - transfer funds electronically for major purchases such as health insurance and construction services. 	Not Implemented	
A.104.E	<ul style="list-style-type: none"> - directly deposit all payroll checks into employees' accounts. 	Not Implemented	
A.104.F	<ul style="list-style-type: none"> - create a formal board policy on cash management. 	Intact	<p>This policy will be drafted. Its content will be affected by the budget adopted for 1993-94.</p>
A.104.G	<ul style="list-style-type: none"> - segregate duties related to account reconciliation and check writing. 	Intact	<p>Done.</p>

Rec #	Recommendations	Implementation Status	Comments
A.104.H	- develop a training program for employees with cash-management duties.	Intact	
A.104.I	- deposit all bank items daily.	Intact	
A.105	<p data-bbox="327 344 1066 472">Create a district Treasury Department and hire a treasurer, with banking or investment experience, charged with the creation of a cash-management program and other treasury functions such as:</p> <ul style="list-style-type: none"> <li data-bbox="373 513 1066 577">- the creation of internal-control policies for purchasing, finance and budgeting. <li data-bbox="373 619 1045 644">- the development of formal cash-management policies. <li data-bbox="373 686 865 711">- cash-flow management and forecasting. <li data-bbox="373 753 1066 849">- development of a system to lead and lag payments, to take advantage of vendor credit terms, cash shortfalls and interest income. <li data-bbox="373 890 1066 954">- analysis of banking relationships for account structure, fee structure and fee waivers. <li data-bbox="373 995 1066 1123">- implementation of a sophisticated tracking system to use true clearing accounts, increase interest income and decrease the amount of compensating balances required by the district's bank. 	Intact	<p data-bbox="1371 344 1976 577">In this case, tangible, realistic revenue benefits are available to offset the cost. The combination of enhanced investment revenue, reduced bank charges and cash management efficiency makes it reasonable to project a net favorable impact upon the budget. A net savings of \$46,300 will be realized annually.</p>
A.106	Perform formal cash-flow forecasts and evaluations of variances between actual cash flow and forecasted cash flow on a regular basis.	Intact	<p data-bbox="1371 1168 1976 1264">The responsibility for these functions is assigned to the district treasurer, who has not yet been hired.</p>
Bond Issuances and Funding			
A.107	Create a five-year facilities master plan linked to the capital budget.	Intact	<p data-bbox="1371 1382 1976 1439">Much of this was already in place at the time of the TSPR review. Additional efforts are under way.</p>

Rec #	Recommendations	Implementation Status	Comments
A.108	Develop, review and distribute a debt-issuance procedures manual that outlines the roles of administration and board members. Update it annually.	Not Implemented	
Technology Systems			
A.109	Consider assigning user-liaison personnel to help the district's user community define necessary enhancements to existing systems.	Not Implemented	Both user interface and programmer/analyst positions would be required to achieve the liaison, analysis and development tasks required. Funding was not approved by the board.
A.110	Acquire computer work stations and COBOL-based maintenance aids for programmer/analyst personnel to develop internal personal computer expertise and off-load mainframe application maintenance and development processing.	Not Implemented	AISD is evaluating products for this purpose. Implementation will depend on future funding.
A.111	Cross-train programmers and analysts, to ensure that the district has adequate programming support. Consider periodically rotating program maintenance responsibilities for each application area.	Not Implemented	AISD felt that a complete rotation of duties would be too disruptive in some application areas. An increase in staffing will be required before this can be implemented without severe user impact.
A.112	Acquire query and report-writer utilities that will support <i>ad hoc</i> end-user information requests.	Not Implemented	
A.113	Compare the capabilities of commercially available project management software to the system currently being developed internally. Reconsider the district's make-versus-buy decision.	Intact	AISD is evaluating packaged project management software.
A.114	Using computer performance monitoring tools, begin charting processor utilization over time.	Intact	AISD has been doing this for a number of years.
A.115	Evaluate alternatives, costs and benefits for replacing several business support applications (fund ledger, purchasing, accounts payable and fixed-asset management).	Not Implemented	The district agrees that this needs to be done, but has not yet been able to allocate the resources.
A.116	Replace the payroll and personnel system. Reevaluate the Oracle system to make sure that it will address all user requirements. If not, define needs and requirements and consider packaged software alternatives.	Intact	Done.

Rec #	Recommendations	Implementation Status	Comments
A.117	Pursue possible reimbursement for programmer/analyst resources and costs devoted to PEIMS reporting requirements.	Not Implemented	
A.118	Select a systems development methodology, particularly if major development projects are on the horizon. Also, consider acquiring computer-aided software development tools to shorten the district's application development cycle.	Intact	The Programming Standards Committee has this on their agenda.
A.119	Consider making Management Information responsible for all district information systems, including instructional computing, bus routing and scheduling and construction management.	Not Implemented	
A.120	Consider adding technical-support positions for the district's new school-based applications and network troubleshooting.	Not Implemented	To implement this recommendation, AISD has stated it would need a network specialist and two programmer/analysts. AISD also would need to add campus support positions as schools increase the number of campus applications, beginning with two positions for each of the district's five areas. Implementation is dependent on funding that has not yet been approved.
A.121	Increase funding for external technology training (such as project management, structured programming, CASE and SDLC).	Not Implemented	
A.122	Upgrade the mainframe processor to improve system responsiveness and end-user productivity. If other current systems are replaced and enhanced, estimate new processor requirements.	Not Implemented	
A.123	Increase computer-aided instruction (CAI) training. Substitute teachers, in particular, do not fully understand CAI products.	Not Implemented	The district did not concur that substitutes need to be trained in CAI. Current guidelines stipulate that substitutes do not use classroom computers or computer labs.

Rec #	Recommendations	Implementation Status	Comments
A.124	Consider increasing the district's number of pilot Apple and IBM instructional labs.	Not Implemented	AISD concurred that the pilot Apple and IBM technology programs have been successful and agreed to consider increasing the program when funds become available.
A.125	Improve communication with and among principals regarding the use of instructional technology purchased with Chapter 1 funds for non-Chapter 1 students.	Intact	Chapter 1 schools with school-wide projects may use materials for all students, while those without school-wide projects are restricted to Chapter 1 students. Principals in schools that qualify for school-wide projects have been encouraged to develop and submit plans for their implementation.
Accounting			
A.126	Transfer responsibility for activity-fund accounting, training, and review from Internal Audit to the Finance Department.	Not Implemented	AISD agreed that activity-fund accounting should be a function of the Finance office. However, staffing changes need to occur prior to moving the function. These changes will require funding which has not yet been approved.
A.127	Establish a system of petty cash accounts for schools and departments that can be used for small and emergency purchases. Eliminate the central-office reimbursement (COR) and confirmation processes. Establish petty-cash accounts at one bank location.	Not Implemented	
A.128	Implement a fixed-asset inventory system, conduct regular physical inventory counts and place identification tags on capital equipment. Analyze available fixed-asset inventories prior to purchasing new fixed assets.	Modified	Upgrades to the district's central processing unit and front-end processor and additional data processing staff would be needed to support these changes. In the past, AISD has not moved surplus items from one school to another. Moving surplus items from one campus to another without some compensation may discourage subsequent activity-fund or booster-club purchases.

Rec #	Recommendations	Implementation Status	Comments
A.129	Combine the district's various payroll cycles into one cycle for all employees. Do so in consultation with groups representing district employees.	Not Implemented	
A.130.A	Define requirements and evaluate alternatives for a new payroll system (in conjunction with a human resources information system). The following features should be considered:	Not Implemented	
	<ul style="list-style-type: none"> - On-line employee attendance reporting - Maintenance of employee pay history for trend and historical analysis - Automated payroll adjustment capability - Unlimited numbers of deductions, taxes, pre-tax deductions and employer contributions - Direct deposit of employees' earnings to bank accounts - Accrual of vacation and sick leave - Capability to process special and temporary contract service payrolls - Overtime authorization - Automated audits to prevent double payment of Supplemental Pay Requests 		

Rec #	Recommendations	Implementation Status	Comments
A.130.B	<p>Define requirements and evaluate alternatives for new financial information systems. With respect to the Finance Department, consider the following features:</p> <ul style="list-style-type: none"> - Interface with the purchasing system (PREQ) - Improved response time for the on-line portions of the Accounts Payable system - Report writer utilities to support the development of necessary financial reports - Capability to print a single voucher without running an entire batch - Ability to write checks for more than \$1 million - Information on check stubs explaining the item or service being reimbursed - Improved timeliness of interdepartmental billings submission - Ability to write large checks through the computer system and notify the cash manager of the release of all large checks 	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
A.131	<p>Transfer responsibility for the following functions from the Finance Department to the Personnel Department:</p> <ul style="list-style-type: none"> - the creation and maintenance of all personnel files, as well as employee leave tracking. - data entry and correction of all salary and account code information on the system. - salary calculations. - establishment of all compensation records for supplemental pay requests and bonuses. 	Intact	This has been implemented. AISD also had hoped to be able to implement tighter controls over supplemental pay by creating a position to monitor this area. Funding for the position has not been approved.
A.132	Review and modify policies and procedures to:		
A.132.A	<ul style="list-style-type: none"> - provide an orientation session for new bookkeepers and principals concerning finance and accounting procedures. Also, train current staff, program managers and supervisors on changes in accounting procedures and codes. 	Not Implemented	AISD has been able to provide periodic voluntary training to school clerks in the past. AISD would like to take this one step further and require clerks to pass a test to show their understanding of the subject; otherwise, the director or principal will be the contact on all financial matters. No action has yet been taken on this recommendation.
A.132.B	<ul style="list-style-type: none"> - develop, review and distribute a Finance procedures manual. Update it annually. 	Not Implemented	Finance published a user's manual in the late 1970s and kept it current up to about 1985. AISD's present workload does not permit the district to devote adequate resources to documentation or training.
A.132.C	<ul style="list-style-type: none"> - create a year-end plan to prepare necessary financial statements, reconciliations and schedules prior to the external auditors' on-site work. 	Not Implemented	
A.132.D	<ul style="list-style-type: none"> - utilize electronic transfers for professional dues, benefits payments and regular bills (i.e., service contracts). 	Not Implemented	
A.132.E	<ul style="list-style-type: none"> - plan and manage summer schools through the traditional budget and finance processes. 	Intact	Done.

Rec #	Recommendations	Implementation Status	Comments
A.132.F	<p>- improve internal controls in Payroll and Accounts Payable with respect to the following:</p> <ul style="list-style-type: none"> • Security of the check stock • Security of the check signer key • Review of manual, in-house and direct pay checks after signing • Review of check signer log and check registers compared to bank records • Documentation for hard-typed checks • Review of repetitive wire transfers • Notification of cash manager before checks for over \$1 million are released 	Not Implemented	<p>AISD acknowledges that internal controls could be strengthened. Some items are addressed in other recommendations. The remainder will require further study. Therefore, the district does not propose to adopt a firm implementation strategy at this time.</p>
A.132.G	<p>- implement TEA Bulletin 679 program codes.</p>	Intact	<p>The implementation was well under way at the time of the audit. The new coding conventions became effective May 1, 1993.</p>
A.132.H	<p>- eliminate the policy of advancing leave to classified and bi-weekly employees. All leave, including state leave, should be earned.</p>	Intact	<p>Revised rules and procedures were in place by September 1, 1993.</p>
A.132.I	<p>- reexamine the travel stipend policy and establish a cost-effective manner of accounting for the use of travel stipends.</p>	Not Implemented	<p>Although AISD agrees with this recommendation, it is unlikely to act on it in the near future.</p>
A.132.J	<p>- transfer and standardize all facility billing procedures from the Community Education Section to the Finance and Purchasing Departments.</p>	Not Implemented	<p>This matter currently is being studied by the administration.</p>

Rec #	Recommendations	Implementation Status	Comments
A.132.K	- create training policies and guidelines for the department.	Not Implemented	The board did not fund this recommendation.
A.133	<p data-bbox="327 271 1066 440">Perform resource-requirements analysis for the Finance Department to determine appropriate staffing and compensation levels. Based upon TSPR's initial review of the current organizational staffing and structure, the following changes appear necessary.</p> <ul style="list-style-type: none"> <li data-bbox="373 478 1066 539">- Reclassify the position of assistant director of Finance to director. <li data-bbox="373 580 1066 782">- Add one accountant to relieve the assistant director of Finance of line tasks and allow him more time to manage personnel; prepare for audits, develop training programs and schedule reviews and analysis. The accountant should review grant purchases and file required federal program reports in a timely fashion. <li data-bbox="373 823 1066 919">- Add an accounting clerk to perform clerical functions currently performed by the accountants and work with payroll, accounts payable and activity funds. <li data-bbox="373 960 1066 1090">- Establish TSPR's recommended organization structure for the Finance Department. Once established, develop and use job accountability standards to schedule and measure productivity and work performance. 	Not Implemented	The board did not approve the budget item that would have supported this recommendation.

Rec #	Recommendations	Implementation Status	Comments
Budget Process			
A.134	<p>Revise the budget document to more fully meet the needs of the board and other users. The proposed budget should:</p> <ul style="list-style-type: none"> - include reports on program, department and school performance as a justification of the budget request. - compare the proposed budget with the prior year's actual expenditures. - illustrate the relationship between board policy and budgeted resources, between program goals and budgeted resources and between performance measures for schools and departments and requested resources. - Include ORE reports and audit results from all grants to show their scope, effectiveness and cost per student. - Create budget summaries of cost centers with multiple budgets and sources of funds including more detailed breakdowns of internal and external funds. 	Intact	<p>AISD's Budget Advisory Committee also has recommended improvements to the budget document's content and scope to allow for more effective communication of key budget and education-related information. The Budget director will work with key members of the Budget Advisory Committee and the Administration to revise the budget document as time and resources permit.</p>
A.135	<p>Create a five-year facility plan linked to the capital budget. The facility plan should track student projections and maintenance needs and facility and portable-building expansions, relocations and reductions.</p>	Intact	See response under A.70.
A.136	<p>Develop and implement a human resources information system, including a position-control system with an interface to budget systems and the Personnel Department.</p>	Not Implemented	Implementation would depend on future board funding.

Rec #	Recommendations	Implementation Status	Comments
A.137	<p data-bbox="331 172 1066 268">Address policy and procedures issues related to the budget process and clearly communicate the resolution to all budget managers. Issues include:</p> <ul style="list-style-type: none"> <li data-bbox="380 309 1066 368">- creation of a board policy on budgeting responsibilities and the budget process. <li data-bbox="380 410 1066 469">- required board approval on large transfers between cost centers, even if the functional codes are identical. <li data-bbox="380 510 1066 611">- delegation of responsibilities for drafting initial school budgets and amendment requests with Campus Leadership Teams. <li data-bbox="380 652 1066 711">- the use of ORE program evaluations in the budget development process. <li data-bbox="380 753 1066 954">- improved budgeting for funds allocated from the Legislature, and the monitoring of changes in this funding to prevent another hiring freeze and budget cuts related to a proration. The board also should also develop a prioritized list of potential budget reductions earlier in the school year. <li data-bbox="380 995 1066 1125">- the initiation of efforts to implement policy, procedural and information-systems changes necessary to consolidate budget funds, in order to improve monitoring and control capability. <li data-bbox="380 1166 1066 1264">- revision of the campus improvement planning process and the school-based budget development process, to merge the two plans into one comprehensive plan. 	Intact	<p data-bbox="1373 172 1980 331">The Board of Trustees' Budget subcommittee and Budget Advisory Committee both recommended a review and development of District financial policies. These policies are currently under review by TASB.</p>

Rec #	Recommendations	Implementation Status	Comments
A.138	<ul style="list-style-type: none"> - initiation of efforts to place budget responsibility for employee benefits with budget managers in AISD schools and departments for the 1993-94 fiscal year. - redesign of the monthly budget update reports to improve their clarity for the end user. The list of program managers and department heads should be updated regularly and maintained in a central location for use in training and the budget process. <p>Develop and conduct in-service training for budget managers that focuses on:</p> <ul style="list-style-type: none"> - the "team" approach to developing a school or program budget. - analysis of historical expenditure trends and forecasting future needs. - new and revised AISD budget policies and procedures. - budget-monitoring tools and techniques. 	Not Implemented	<p>The district's Budget Advisory Committee also has recommended comprehensive training and continuing support for principals, campus leadership teams and school administrative staff in the areas of budget development and use. They also have recommended the development of a school budget manual and have proposed that leadership teams should be encouraged, but not required, to include individuals with business experience. The district may pursue these projects in the future.</p>
A.139	<p>Investigate opportunities to use the district's information systems more effectively in support of the budgeting process. To do this:</p> <ul style="list-style-type: none"> - investigate options available for pre-encumbering funds in the purchasing system, so that the monthly budget reports reflect more timely information. - automate the loading of all budgets into the general ledger. - consider adding editing and budget-building abilities to the district's information systems. - allocate benefits to departmental budgets prior to the final approval of the budget. 	Not Implemented	<p>The district agreed with this recommendation but has not yet acted on it.</p>

Rec #	Recommendations	Implementation Status	Comments
A.140	<p>Adjust the budget development calendar to begin activities at an earlier date and complete adoption of a final preliminary budget, based on state-mandated programs and minimum expected funding levels, at least eight weeks prior to the end of the current fiscal year. TSPR suggests the following timing.</p> <ul style="list-style-type: none"> - Complete the annual update of the strategic plan and the development of annual goals and objectives by November 1. - Complete development of preliminary budgets for AISD departments and schools by March 1. - Complete the proposed budget document and present it to the Board of Trustees by March 30. - Complete all budget hearings and workshops by June 1. - Submit budget amendments, in writing, by June 15. - Adopt the final preliminary budget by July 1. - Adopt the final budget after proration information is available in late July. <p>While it may not be feasible to meet the timeframes outlined above for the adoption of the 1993-94 budget due to timing constraints, AISD should strive to meet these time lines in future budget development efforts.</p>	Modified	<p>AISD has begun permanently adopting school staffing formulas in March for the following school year, and has begun initiating the budget development process at an earlier date. However, since proration information is not finalized until after the conclusion of the budget year, AISD found it impossible to concur with this portion of the recommendation.</p>
A.141	<p>Conduct a resource-requirement analysis to determine appropriate staffing levels for the Budget Department.</p>	Not Implemented	<p>Funding for this action was not approved by the board.</p>

Internal Audit

A.142.A Implement organizational changes to:

Rec #	Recommendations	Implementation Status	Comments
	- provide for a more structured reporting relationship with the Board of Trustees. The Internal Audit Department should hold regularly scheduled meetings with the board through an audit or finance committee of the board.	Not Implemented	The director of Internal Audit currently reports to the superintendent on a day-to-day basis and directly to the board quarterly.
A.142.B	- provide staff with necessary training courses and cross-training opportunities to increase their effectiveness and efficiency in performing their jobs, as well as to maintain professional certifications.	Intact	AISD is implementing this recommendation and feels that it will also provide an opportunity for the department to comply with federal regulations requiring continuing professional education for staff.
A.143.A	Review and modify policies and procedures to create:		
	- periodic follow-ups on audit findings. Reports prepared by Internal Audit staff should state explicitly that follow-up will occur within a given time frame.	Intact	Internal Audit staff now explicitly state the time-frame in which a follow-up will occur.
A.143.B	- training policies and guidelines for the department.	Not Implemented	Implementation of this recommendation will depend upon funding for additional staff training.
A.143.C	- a disciplinary policy regarding staff administrators and board members who violate board policies and procedures.	Not Implemented	AISD feels the disciplinary policies in its classified and administrative personnel manuals provide adequate guidance on this issue.
A.144	Transfer all responsibilities for activity funds accounting, training and review to the Finance Department.	Not Implemented	The district plans to implement this recommendation in the future.

Rec #	Recommendations	Implementation Status	Comments
A.145	<p>Expand the scope of internal audits to include all AISD operations using district resources. In particular, the following additional areas should be audited periodically:</p> <ul style="list-style-type: none"> - Equipment inventories - Athletic operations, including accounting for gate receipts - Personnel practices - Payroll practices - Purchasing and contracting practices - Adherence to terms of contracts and grants - Warehouse operations - Supply inventory controls - Maintenance operations - Use of AISD assets - Custodial operations - Food service operations - Utility bills and consumption - Data processing 	Not Implemented	
Purchasing			
A.146	<p>Train district personnel in purchasing policies and procedures, with special emphasis on submitting bids and purchase orders.</p>	Intact	<p>This training took place in summer 1993. Attendance at these training sessions was mandatory.</p>

Rec #	Recommendations	Implementation Status	Comments
A.147.A	Develop and implement a Purchasing Department "Automation Plan" to: - implement the electronic requisition system throughout the district.	Intact	AISD has been working to increase participation in electronic purchasing for nearly two years. Participation will be made mandatory during the 1993-94 fiscal year.
A.147.B	- upgrade the data-processing system to expedite the processing of purchase orders during peak periods.	Not Implemented	
A.147.C	- expedite implementation of the automated Vendor Commodity Requisition System, to improve vendor monitoring and minimize the mailing of purchase orders.	Intact	Vendors are now being placed on the vendor list by commodity. An upgrade of the district's central processing unit would enhance this system.
A.147.D	- completely automate the textbook ordering system, to minimize delays in delivering textbooks at the beginning of each school year.	Not Implemented	Further automation of the textbook ordering process will take place as AISD's data processing capabilities are upgraded.
A.147.E	- automate the used and surplus furniture ordering system at the central warehouse.	Not Implemented	Automation of used and surplus inventory ordering was considered several years ago. The idea was rejected primarily due to the difficulty of describing available surplus furniture. In addition to differences in condition, the number of sizes and types of some items would make them difficult to describe and difficult for potential customers to order.

44

Warehousing

A.148	Initiate a detailed cost/benefit analysis to implement a central receiving function.	Not Implemented	
A.149	Improve warehouse space use by installing three-tier racks and removing surplus furniture and other low-value goods.	Intact	Done.

Rec #	Recommendations	Implementation Status	Comments
A.150	Consider restructuring delivery routes to ensure cost-efficient deliveries.	Intact	This is, and will continue to be, a current practice.
A.151	Consider contracting out furniture auctions.	Not Implemented	
A.152	Conduct an inventory of all furniture throughout the district.	Not Implemented	The district is evaluating surplus furniture stored in its warehouse. Undesirable furniture is being eliminated. However, AISD has stated that the cost of a full furniture inventory would greatly exceed the benefit of a sale of excess furniture. TSPR believes the benefit of conducting an inventory is not limited to the proceeds of sales of excess furniture; for example, an accurate inventory may help the district avoid ordering unnecessary new furniture. One district studied by TSPR has found that an inventory helped them to lower their insurance costs.

45

Food Services

A.153	Perform a cost-benefit analysis on the construction of a frozen-food locker in Austin. Compare the total cost of constructing and operating the locker with the current costs of using a facility in San Antonio.	Not Implemented	Although the district concurred with this recommendation, no action has been taken to date.
A.154	Consider automating the daily operating sheet and the food and supply requisition system.	Not Implemented	AISD has stated that instituting such measures in each of its school cafeterias would cost approximately \$144,000 for hardware, plus other costs for wiring and adapting existing software. The district does not plan to make this expenditure at present.
A.155	Reduce the number of area supervisors from five to three to coincide with the new organizational structure recommended for School Operations.	Not Implemented	The district did not agree with this recommendation, citing increased responsibilities and span-of-control issues.

Rec #	Recommendations	Implementation Status	Comments	
Pupil Transportation				
A.156	Review increases in overtime costs over the past three years and implement tighter measures to restrict overtime.	Intact	The Transportation Department is employing flexible work schedules and computerized payroll tracking to reduce overtime where ever possible.	
A.157	Consider interfacing the Pupil Transportation Department's payroll system with the district's payroll system, thereby eliminating the manual transcription of these data.	Intact	A purchase order was issued on March 12, 1993 for customized payroll file output that will facilitate communication between Transportation's computer system and the district's.	
A.158	If further streamlining in the processing of field-trip bills is deemed necessary, consider hiring additional staff or modifying the existing billing system.	Intact	AISD feels that current billing times of six weeks are adequate. However, the Finance and Transportation Departments are considering modifying the district's existing purchase requisition system to handle field-trip requests.	
46	A.159	Review the Pupil Transportation Department's insurance coverage and cost.	Intact	In December 1992, the district took competitive bids from 20 companies for its insurance coverage. The lowest bidder was awarded the contract by the Board of Trustees on February 1, 1993. The contract was 10 percent lower than the previous contract for the same coverage.
A.160	Expedite implementation of the department's computerized inventory-control system and the district's purchasing requisition system at the two remote vehicle service centers.	Not Implemented	The Transportation Department has been attempting to bring the remote service locations into the network loop where the vehicle maintenance program is maintained. The cost figure shown in TSPR's report is adequate to support connections to both environments, but falls short of what would be required to achieve full integration of the two.	

Rec #	Recommendations	Implementation Status	Comments
A.161	Include a provision for new buses in the 1993-94 budget.	Modified	AISD admits that its Transportation Department has lacked an adequate vehicle replacement program for several years. Buses have been purchased to handle student population growth but few have been used to replace aging vehicles. The Transportation Department retired 40 buses this school year; fleet age is a constant concern for the department. The district budgeted \$550,000 for new buses in the 1993-94 budget, about half the amount advised by TSPR.

Vehicle Maintenance

A.162	Perform an activity-based analysis to identify and eliminate costly maintenance and vehicles, as well as potential opportunities for out-sourcing. Human and financial resources can then be redirected to value-added activities and the replacement of costly vehicles.	Not Implemented	
A.163	Implement a central receiving and integrated inventory tracking system for the Vehicle Maintenance Division. This inventory system should be integrated with the work-order tracking system to improve materials usage and control. In addition, existing storage space should be better used to minimize the number of purchase orders and trips to pick up parts.	Intact	The district has begun developing a computer program that will replace Vehicle Services' current preventive maintenance program. This program will be used by the entire Service Center and will track the receipt and dispersal of parts and document tie them to completed work orders.
A.164	Consider having Vehicle Maintenance develop their own bid specifications and a separate supply contract rather than relying on supply contracts used by the Pupil Transportation Department.	Not Implemented	
A.165	Enforce existing procedures designed to ensure preventive maintenance is performed for all vehicles, as scheduled. If existing procedures are deemed inadequate, consider developing new ones.	Not Implemented	The district believes current procedures are adequate, and has made no changes.

Rec #	Recommendations	Implementation Status	Comments
Campus Police			
A.166	<p>Implement a campus security plan to ensure that school needs and board expectations are fulfilled in the most cost-effective and efficient manner. Consideration should be given to:</p> <ul style="list-style-type: none"> - planning for additional resources to meet future needs. - use of part-time personnel as a supplement to district personnel to cover peak hours. - appropriate training for officers working in an educational environment. - adequate coverage of school grounds and facilities to reduce property loss and increase security for district employees and students. - control of after-hours access to facilities, including key control. 	Not Implemented	Although district staff agreed with this recommendation, no action has been taken.
A.167	Reorganize the Campus Police Department's reporting relationship to allow the department to accomplish its primary duties more effectively and efficiently. (The head of the campus police currently reports to the director of Construction Management.)	Intact	According to the district, this has been done.
A.168	Campus police should establish formal lines of communications with principals to ensure proper adherence to security policies and procedures in their treatment of security incidents, incident reporting and documentation, investigation reporting and building-key access.	Intact	Much of this was implemented as a result of a new state law requiring reports of criminal incidences on campuses. Police also are required to report student arrests to the district.
A.169	Hire additional patrol officers to meet the increased demands placed upon the Campus Police Department. Hire one additional dispatcher and a part-time clerk to document reports and fill in as a dispatcher during peak periods.	Intact	The district agreed with this recommendation, but thus far has approved only partial funding. Implementation will continue as funds become available.

Rec #	Recommendations	Implementation Status	Comments
A.170	Implement a part-time patrol officer program to alleviate overtime and turnover and support the regular staff.	Not Implemented	Additional costs for ten part-time officers' salaries and related equipment were not approved by the board.
A.171	Implement an incentive pay structure tied to Texas Commission Law Enforcement Officer Standards and education certification levels. In addition, the department's training budget should ensure that police officers have the opportunity to receive the training required to meet certification levels and district needs.	Not Implemented	The district stated that they believe an incentive pay structure would aid in retaining officers and other personnel. However, no action has been taken to implement this recommendation.
A.172	Allocate funds for fire alarm installation and replacement in the next bond issuance, to bring these systems up to satisfactory condition.	Intact	The district will address this recommendation in its next bond issue; however, they already have begun to provide necessary enhancements through the operating budget and some surplus funds from the 1991 bond program. While not all of the installations and replacements can be accomplished in this way, it should significantly decrease the amount needed to fund this project in the future.
A.173	Develop, implement and enforce policies and procedures limiting access to school facilities in order to minimize false alarms.	Intact	A study is under way that will examine the causes and number of false alarms at each campus, in an effort to identify habitual abusers. The board then will decide on appropriate actions to improve performance.

49

Office of Research and Evaluation

A.174	Review the scope of services provided by the Office of Research and Evaluation and determine its appropriate levels of service in relation to available resources.	Not Implemented	
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Calhoun County ISD

Period of TSPR review: 3/93-5/93

Consultant: KPMG Peat Marwick

Estimated savings from TSPR recommendations: \$2,266,000

Rec #	Recommendations	Implementation Status	Comments
District Organization and Management			
CC.1.A	Place the Personnel Department under the direction of the assistant superintendent of Business and Related Services.	Not Implemented	The district is considering this recommendation.
CC.1.B	Update the district's administrative regulations and specific functional-area operating manuals to reflect current operating policies and board directives and clearly define procedures for implementing board policy.	Intact	This recommendation is being implemented.
CC.1.C	Institute formal training programs that define district goals and policies so that all district administrators, directors and principals consistently implement procedures and practices throughout the district.	Intact	Principals and department heads will receive training during monthly staff meetings, and will be responsible for passing this information along to their staffs.
CC.1.D	Establish a formal strategic planning process and a budget process that reflect goals and objectives established in the strategic plan. The district's final strategic plan should be documented and distributed to all principals, directors and administrators.	Intact	This recommendation is being implemented.
CC.1.E	Form cooperative alliances with local municipalities and county government to consolidate and share certain support services, such as maintenance, records management, purchasing and technology functions.	Intact	This recommendation is being implemented.
School Management			
CC.2.A	Adopt the organizational structure for the district's educational operations recommended at CC.40.	Modified	See response at CC.40.

Rec #	Recommendations	Implementation Status	Comments
CC.2.B	Provide formal management and administrative training in site-based management to campus administrators and support staff.	Intact	This recommendation is being implemented.
CC2.C.	Consolidate campus administration and support staff at Harrison, Jefferson and Madison elementary schools, and at Jackson elementary and Crockett middle schools. This consolidation would improve campus administration and lower costs.	Intact	This recommendation is being implemented.
CC.2.D	Close Fannin middle school. Transfer sixth-grade students to Seadrift elementary or Crockett middle school and seventh- and eighth-grade students to Travis middle school. This will save the district money through lower utilities and payroll and benefit costs.	Not Implemented	This recommendation was rejected due to objections from board members and the community.
CC.2.E	Transfer the bookkeeper position at the high school to central administration, to oversee purchasing and bidding procedures within the district. Eliminate redundant accounting and book-keeping procedures at campuses.	Modified	The bookkeeper position was not transferred because the district felt this position was necessary to the high school's operation. However, the district did move the purchasing and bidding function to the central office, without hiring additional help.

52

Food Services

CC.3	Develop an accurate and detailed budgeting and financial reporting system for the Food Service Department. Consolidate budgets for individual food-production cost centers into a single departmental budget. Generate monthly profit-and-loss statements to compare actual results with budgeted standards. Track key operating statistics (such as student participation, food and payroll expenses and labor productivity) and integrate them with profit and loss statements. The Food Service supervisor should hold monthly manager meetings to identify unfavorable budget variances or trends and work with managers to reverse these situations.	Intact	A monthly Food Service financial report and budget analysis form will be compiled from the district's end-of-month data printout. The financial report will show a profit/loss statement for each month. At this time, the district holds bi-monthly manager's meetings; the last meeting of each month will focus on budget variances. Each month, a copy of both reports will be sent to the superintendent and assistant superintendent for business.
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Rec #	Recommendations	Implementation Status	Comments
CC.4	Increase revenues by 5 percent during the 1993-94 school year, by increasing student participation in the District's school lunch program. The following three recommendations will facilitate achievement of this goal.	Intact	Increasing revenue by 5 percent during the 1993-94 school year would raise \$48,000. The vending machines will be closed during breakfast and lunch hours to help achieve this goal.
CC.4.A	Formalize the menu-development process by conducting annual student surveys; analyzing historical menu item sales; studying other districts' menus; conducting formal product testing and evaluation; monitoring national and regional student food-preference trends, and seeking guidance from TEA Child Nutrition Program consultants.	Intact	<p>In 1990-91, the district conducted a student survey that was used to develop 1991-92 menus. The district will continue to survey students using taste testing cards, and analyze menus through input from managers and other Food Service employees and by visiting schools and looking at food waste. During the 1992-93 school year, district personnel visited three other school food-service departments; useful ideas from these schools were adopted wherever possible. The CCISD Food Service Department also compares and evaluates the menus of a neighboring school district on a regular basis.</p> <p>Moreover, participation in the regional cooperative has given the Food Service director opportunities to attend "can cuttings"—food tastings to evaluate product taste and quality. Menu items have been and will continue to be selected according to food cost, preference, trends, product quality, facility/equipment requirements, commodity availability, labor requirements and student popularity.</p>
CC.4.B	Increase participation in the district's free and reduced-price meal program through improved applicant accessibility. Parents of potential student participants should be notified through various media (such as newspapers, flyers in grocery stores, local agencies and churches) to apply at a convenient location at a specific time and date.	Intact	By law, the Food Service Department advertises the free and reduced-price lunch program in the newspaper, at the Texas Employment Commission and the Welfare Department. In addition, the district distributes applications for the program to every student, in English as well as in Spanish. The department also will put flyers in grocery stores and make churches aware of the program, as TSPR recommends.

Rec #	Recommendations	Implementation Status	Comments
CC.4.C	Purchase a vehicle and related equipment that are designed for transporting and delivering heated and refrigerated foods to all satellite campuses (except Fannin). Heated food carts, rather than thermal containers, should be used to transport food from Seadrift to Fannin. Wooden ramps should be relocated from Point Comfort and Port O'Connor to Seadrift so carts can be rolled off older vehicles. The Food Service director should plan menus based on their appropriateness for transportation, and all heated food products should be reheated to proper temperatures upon arrival at the satellite campus locations (except Fannin).	Not Implemented	CCISD maintains that a hot/cold food transporting vehicle would cost \$25,000 and not the \$20,000 projected by TSPR. Food transported to Fannin is transferred in thermal containers instead of heated carts because Fannin lacks loading ramps, making it difficult to load carts into the van. During the 1992-93 school year, the Food Service Department bought Fannin a steam table to ensure that food was kept warm during serving. The district is considering installing vent-a-hoods at Point Comfort and Port O'Connor, to enable these schools to prepare foods that do not transport as well.
CC.5	Consider increasing departmental revenue sources through a catering or meal-delivery program to customers within the district.	Not Implemented	
CC.6	Reduce expenses associated with food purchases to no more than 43 percent of total departmental revenue. This objective can be achieved largely through lower food prices obtained through district participation in a cooperative purchasing arrangement.	Intact	According to the CCISD Food Service budget for the 1993-94 school year, food costs total 41 percent of revenue.

Rec #	Recommendations	Implementation Status	Comments
CC.7	Price menu items to insure that food-cost percentages (that is, food cost as a percentage of menu price) is maintained below 45 percent for full meals and below 40 percent for a la carte service and snacks. Increase full meal prices by approximately 3 percent during the 1993-94 school year. Similar price increases should be implemented in future years to coincide with projected increases in food and payroll expenses.	Not Implemented	<p>Food costs have always been a factor in menu planning. The district will begin documenting costs to ensure that the costing is accurate and that food-cost percentages remain below the recommended thresholds.</p> <p>TSPR's report states that "the average daily participation in the District's Type A meal lunch program has declined from an estimated 58% in 1990-91 to an estimated 52% in 1992-93." According to district records, average daily participation in the Type A lunch program in 1990-91 was only 53 percent, and in 1992-93 dropped to 52 percent. The district feels this decline was due to price increases that began in 1992, and that the recommended price increase would only decrease participation further.</p>
CC.8	Encourage an existing Adopt-A-School program participant or seek a new participant to sponsor a snack program for pre-kindergarten children. Annual fees of at least \$30 per student would be required to offset costs associated with this program.	Not Implemented	CCISD is considering discontinuing snack service, as it costs more than \$10,000 a year. Breakfast and lunch will be offered to pre-kindergarten students to compensate for the snacks. The district feels that if the school wants to continue pre-k and kindergarten snacks, responsibility for the service should rest with parents or the PTA.

Rec #	Recommendations	Implementation Status	Comments
CC.9	<p>Develop or purchase a formal campus food cost-control system. The Food Service director should review documentation associated with food production, weekly orders and weekly and monthly inventories, to identify and correct deficiencies. In addition, storage areas and kitchen entrances should be secured at all campuses. Managers should issue requested products and accept vendor deliveries only at scheduled times.</p>	Modified	<p>Food Service managers submit production records for review each week.</p> <p>Securing kitchen entrances and storage rooms during serving hours would be difficult. Personnel pass in and out of storage rooms throughout the day for the next day's food preparation. The manager is the only person with a key to storage rooms.</p> <p>Only Food Service employees and vendors are allowed in the kitchen. The district asks vendors to come at certain hours; however, this is sometimes impossible for them. Many times the vendor comes during serving time, which would force each manager to stop taking money to unlock the door.</p> <p>A monthly inventory form already has been developed. Food is ordered weekly. The district feels a weekly inventory would be redundant and time-consuming.</p>
CC.10	<p>Reduce Food Service Department payroll expenses to 42 percent of revenue. To achieve this standard, revise staffing schedules at individual campuses to achieve a departmental productivity level of 14 meals per labor hour. According to recent average daily participation figures, this would require a reduction of 50 hours, or 10 percent, of current average daily labor hours worked by cooks and helpers at district campuses. About half of these excess hours are represented by hourly personnel at Calhoun County High School. The following suggestions would facilitate achievement of the recommended departmental labor-cost benchmark.</p>	Intact	<p>The department cut hours and cook positions through attrition throughout the 1992-93 school year. Payroll for the 1993-94 budget is now 51 percent of expected income. More cook titles will be cut through attrition.</p>

**Implementation
Status**

Rec #

Recommendations

Comments

Rec #	Recommendations	Implementation Status	Comments
CC.11	Revise staffing practices to achieve and maintain budgeted labor costs and productivity standards. This effort should include a departmental hiring freeze, natural attrition and employee transfers from overstaffed to understaffed campuses. Reduce six- and seven-hour-a-day cook and helper positions by one hour per day; hourly substitutes should no longer be used to fill these vacant positions. When productivity standards are achieved, all new hourly personnel should be hired as helpers (at minimum wage) for a maximum of 15 hours per week; all cook positions should be phased out.	Intact	The department began doing this during the 1992-93 school year.
CC.12.A	Reduce the scope of the breakfast menu and eliminate all labor hours associated with the breakfast program at Point Comfort and Port O'Connor. Train school aides at these locations to serve a simplified daily breakfast menu (such as prepackaged cereal, muffins, donuts, pastries or toast and juice or milk) in accordance with Child Nutrition Program standards. This breakfast menu also should be served two days a week at all other campuses.	Not Implemented	
CC.12.B	Discontinue operation of the snack bar and snack serving stand at Calhoun High School. All full meals, a la carte and snack items should be consolidated into the two cafeteria serving lines.	Not Implemented	The district does not intend to close the snack bar, because it brings in almost \$300 a day and reduces congestion in serving lines. The school lunch hour is not long enough to serve the student population with only two lines.

Rec #	Recommendations	Implementation Status	Comments
CC.13	<p>Convert Roosevelt Elementary from a campus that prepares its own food to a satellite campus and use Calhoun High School as the central production kitchen for Roosevelt Elementary (in addition to the satellite it currently serves). Eliminate the manager position at Roosevelt Elementary. The driver should deliver meals to these locations and assist with lunch service at Port O'Connor. The driver then should return to each satellite campus to pick up leftover foods and containers and return them to Calhoun High School. Since satellite campuses do not have managers, the Food Service supervisor should visit each satellite location at least once a week to monitor lunch service.</p>	Not Implemented	<p>CCISD has stated that Roosevelt Elementary Cafeteria is the most recently remodeled kitchen in the district, and that it does not wish to turn it into a satellite kitchen. Moreover, Calhoun High lacks sufficient storage space to store food for another satellite school.</p> <p>CCISD also maintains that average daily participation at Roosevelt should go up when the school begins serving pre-kindergarten students. Pre-K service will be monitored to see if it has enough impact on participation to keep the kitchen operational. If Roosevelt continues to lose money, appropriate action will be taken.</p> <p>CCISD disagrees with the recommendation concerning the driver's return to each satellite campus. However, the supervisor will visit satellite schools more often.</p>
CC.14	<p>Transfer janitorial positions back to the Maintenance Department and assign food service personnel the responsibility for cleaning kitchen areas. Janitors should resume their former responsibilities of clearing the school cafeteria dining area and performing other campus-related activities. The satellite driver should replace janitorial positions in delivering commodities to district campuses.</p>	Not Implemented	<p>The district believes it would be less expensive to keep the three janitorial positions in the food service department.</p>

Rec #	Recommendations	Implementation Status	Comments
CC.15.A	Implement a standardized on-the-job training program for all Food Service personnel. Managers should receive a month of training, while all hourly workers and substitute employees should receive one week of training. Designate one campus as a training center for all Food Service personnel. Employees should be cross-trained and rotated among positions and locations to increase departmental productivity.	Modified	CCISD conducted five mandatory training sessions for employees during the 1992-93 school year. However, many managers and employees hold other jobs during the summer, and it would not be possible to hold a month-long workshop for managers and a week-long training program for the other employees. Moreover, paying employees for this training would be very expensive. The School Food Service Organization offers numerous day-long workshops throughout the year that many CCISD workers attend. The department will try to develop and implement training programs for teacher work days.
CC.15.B	Increase budget allocations for the professional training and development of management personnel. The Food Service supervisor and food service managers should attend professional workshops and seminars and visit successful school district food service programs in other locations.	Modified	The 1993-94 budget reduced funding for professional training. Currently, employees pay for workshops themselves. After reviewing Food Service financial statements from the 1993-94 school year, the district will work to increase the professional training budget. The director will attend monthly meetings of food-service directors in Corpus Christi. Information received at these meetings will be passed along to managers and their employees.
CC.16	Eliminate duplicate clerical activities performed at the Food Service Department and the district accounting office. Food Service managers should submit all information and correspondence associated with accounts payable, daily cash receipts and payroll directly to the district accounting office. The department should no longer maintain any records or handle any correspondence related to cash receipts, accounts payable or payrolls and benefits. This should eliminate about 10 hours a week of work currently performed by the departmental secretary. These hours should be redirected to assist the department director in implementing TSPR's recommendations and completing all application processing, correspondence and reports associated with the Child Nutrition Program.	Intact	All daily cash receipts will go directly to the central office. Payroll now will be checked only at the central office, instead of being checked at the Food Service office first.

Rec #	Recommendations	Implementation Status	Comments	
CC.17	Improve campus cash controls through the purchase of cash registers and the daily deposit of all cash receipts. This should eliminate much manual paperwork now performed in meal transactions and provide the Food Service director with a useful tool in menu planning.	Not Implemented	The director has assessed cash registers and software and has not been impressed with the software available. In addition, TEA is discussing a Universal Free Lunch Program. The district does not want to invest thousands of dollars in software until TEA has made a decision.	
Pupil Transportation				
CC.18.A	Require the Transportation Department to develop a revised organizational structure for approval by the Board of Trustees, to establish clear lines of authority within the department and between the department and district administration. Reporting relationships should be incorporated into existing job descriptions for the transportation secretary, mechanics, bus drivers, bus monitors and bus aides.	Intact	Done.	
09	CC.18.B	Schedule regular meetings between special-education bus drivers and the special services teacher so that bus drivers are prepared to provide services to special-needs students.	Intact	Meetings have been scheduled.
CC.18.C	Stagger school starting and ending times to allow more buses to complete two or more trips in the morning and afternoon.	Not Implemented	The district is still considering staggered schedules.	
CC.18.D	Bus drivers should be required to submit disciplinary notices to school principals promptly. School principals should act on discipline notices within one day.	Intact	Bus drivers now take discipline notices promptly to the principals. If the principal fails to act on a notice, the Transportation Department notifies the assistant superintendent.	
CC.19	Purchase a computerized fuel-control system that accurately accounts for fuel usage to minimize the risk of fuel theft or misuse. Since such systems can record odometer readings, they also can alert maintenance staff when buses are due for preventative maintenance.	Not Implemented	A fuel management system will be purchased when funds are available.	
CC.20.A	Limit the number of out-of-district trips that can be requested by each campus. Out-of-district trips cost more per mile due to the amount of driver overtime incurred, especially for overnight trips.	Not Implemented	CCISD states that this is a site-based decision that must be made by each principal.	

Rec #	Recommendations	Implementation Status	Comments
CC. 20.B	Encourage school and program administrators who request extracurricular transportation services to provide anticipated schedules as far in advance as possible.	Intact	Trips must now be requested 72 hours in advance.
CC.21	Establish a budget chargeback system for fuel costs incurred by the Maintenance Department, to encourage fuel conservation.	Intact	The district now allocates expenses between the two departments as suggested.
CC.22	Require the Transportation Department to periodically review the mileage of district vehicles. Reassign vehicles to better balance mileage across vehicles.	Intact	Done.
CC.23	Reduce the number of buses owned by the district.	Not Implemented	The district plans to sell three to five buses in the next year at auction.
CC.24	Keep an insurance policy on file for all buses in motion.	Intact	Transportation is having written insurance policies faxed to the district prior to bus or vehicle usage.
CC.25	To make the best use of the district's vehicle paint booth, contact other local agencies and contract with them to paint their vehicles or equipment. Use the paint booth to paint chairs, tables and other small items for the district when appropriate.	Intact	The district has been in contact with the City of Port Lavaca regarding vehicle and equipment painting.
CC.26.A	Require the Transportation Department to maintain a file of all complaints received, including a description of the complaint and an explanation of the steps taken to resolve the problem.	Intact	Done.
CC.26.B	The district should make use of a personal computer to track fleet records, work orders, preventative maintenance schedules, parts inventory and fuel usage. An appropriate computer system could identify rarely used parts and suggest appropriate re-order quantities based upon historical usage patterns.	Not Implemented	The department is investigating different software packages.

Rec #	Recommendations	Implementation Status	Comments
Safety and Security			
CC.27	Hire a person with formal training in law enforcement to be responsible for developing, implementing and promoting a comprehensive safety program as intended by school board policy. The position's duties and responsibilities should include:	Not Implemented	The district will consider making this recommendation a part of the responsibilities of a yet-to-be-hired security coordinator. However, the district has not yet decided to hire this person.
CC.27.A	- developing campus security plans for each school, compiling them and submitting a district-wide security plan for the school board's approval.	Not Implemented	See above.
CC.27.B	- tracking and recording the number and type of crimes that occur in district schools, and calculate and report the true cost of criminal property damage using actual bills. The district should use this information in the development of new safety and security programs.	Not Implemented	See above.
CC.27.C	- developing and implementing drug-prevention programs and submitting grant proposals to receive funding for these efforts.	Modified	The district's DARE program was implemented district-wide for the fourth grade, as a combined effort with the county and the City of Port Lavaca.
CC.27.D	- acting as a liaison between the district and local law enforcement agencies.	Not Implemented	See above.
CC.27.E	- overseeing district alarm systems and working to minimize false alarms.	Not Implemented	See above.
CC.27.F	Locate the proposed safety coordinator within the district's central office and have responsibility for the safety and security program budget.	Not Implemented	See above.
CC.28	Acquire alarm systems for all rooms that contain valuable equipment. Perform a cost analysis to determine the feasibility of contracting with a private company for alarm services.	Not Implemented	See above.

Rec #	Recommendations	Implementation Status	Comments
CC.29	As part of the campus security plan, develop and test an emergency plan to respond to chemical spills or chemical leaks. Provide local police and fire departments with a copy of the plan.	Intact	The district is in the process of implementing this recommendation.
CC.30.A	Invest in a new door-lock system for all schools and provide staff training in the use of the system. The system should provide door locks with changeable inner cores.	Not Implemented	
CC.30.B	Equip high-school lockers with combination locks to prevent the hiding of drugs or weapons in unlocked or unused lockers.	Not Implemented	The district is considering this recommendation.
CC.30.C	Hold regular monthly or bimonthly safety meetings with staff to facilitate safety planning and programming.	Not Implemented	The district will attempt to do this in the future.

Purchasing

63

CC.31	Perform periodic analyses of expenditure trends in relation to other district growth indicators. These indicators should include (but not be limited to) student population, facilities, tax base, local demographics, economic trends and inflation. Question the reasonableness of expenditure growth patterns when other indicators reflect different trends.	Not Implemented	
CC.32	Develop a formal purchasing policy and procedures manual or purchase one through the Texas Association of School Business Officials (TASBO) or the regional service center. This manual should document the district's policies concerning the procurement process and define specific procedures and tasks required to enter into contracts and other obligations. The manual should include the following: <ul style="list-style-type: none"> - Board policy statements governing bids, purchasing and accounts payable - Approval limits and authorization requirements by amount of purchase 	Not Implemented	CCSID will contact TASBO and the Region 3 education service center to see whether a manual is available.

Rec #	Recommendations	Implementation Status	Comments
	<ul style="list-style-type: none"> - Detailed procedures and tasks required to purchase items, including pre-approval of purchase requisitions - Detailed operating procedures surrounding bid offerings - Identification of items requiring bid offerings - Vendor monitoring and performance analysis procedures - Internal controls and invoice processing procedures - Expense reimbursement and travel expense procedures 		
CC.33	<p>Conduct in-house training for district personnel on purchasing policies and procedures. Place special emphasis on documented pre-approval of purchases and proper purchase-order procedures.</p>	Intact	A training session was held in August 1993.
CC.34	<p>Reallocate the bookkeeper position from the high school to the central business office. Central-office bookkeepers' responsibilities should be enhanced to include more account analysis and review of controls. Require all bidding and other contractual negotiations to be coordinated through the chief accountant and the assistant superintendent for Business. Delegate bookkeeping and accounting responsibilities currently performed by the chief accountant to bookkeeper positions. Maintain all bids, contracts and other legally binding documents in the business office. Monitor requisitions to identify items that could require formal bid offerings.</p>	Not Implemented	<p>CCISD feels it is not wise to move the high-school bookkeeper to the central office because the bookkeeper is needed at the high school. For the chief accountant to take on more responsibility, another bookkeeper position would have to be created at the central office. CCISD is in the process of centralizing all bidding.</p>
CC.35	<p>Use pre-numbered purchase orders to avoid inefficient and costly manual numbering. Pre-numbered POs also will provide an internal accountability control over purchases and help prevent illegitimate purchases from passing through system.</p>	Modified	<p>CCISD currently has 17,000 POs in stock and feels it would not be cost-effective to discard these and order prenumbered ones. The district does not believe that pre-numbered POs offer a significant advantage because the district already has adequate internal controls.</p>

Rec #	Recommendations	Implementation Status	Comments
CC.36	Implement a formal vendor evaluation and monitoring system for items that fall outside the Region 1, 2 and 3 cooperative program. For vendors outside the program, consider negotiating or bidding for favorable prices, terms and conditions and using blanket purchase orders.	Not Implemented	
CC.37	Eliminate the use of district credit cards and require board approval for any travel or other expense reimbursements for the superintendent. The district purchasing manual should address board policies regarding travel and expense reimbursements and define required documentation to substantiate any expense. Should the district elect to continue its use of credit cards, have employees personally apply with a preferred credit-card company. This will require the employee to carry the burden of pay-back responsibility and shield the district from liabilities. All employee expense reimbursements should be approved and processed in the same way, regardless of the method of payment involved.	Not Implemented	CCISD's superintendent feels that credit cards do not have to be eliminated because adequate controls are in place.
CC.38	Since the district will participate in the combined Region 1, 2 and 3 purchasing cooperative, the warehouse/delivery position should be phased out over the next 18 months. Consider automating inventory tracking when stock amounts become large enough to justify the investment.	Not Implemented	This position will be re-evaluated after the current school year.
CC.39	Implement a policy to take advantage of all vendor discounts.	Intact	CCISD maintains it already takes advantage of all available discounts.

Educational Service Delivery

CC.40	Implement the following organizational changes to promote better coordination of services, place related services within the same departments, increase communication within and among departments and other central office personnel, save resources and provide for more efficient and effective delivery of services.	Not Implemented	
CC.40.A	- Change the Department of Instruction's name to the Department of Instruction and Special Projects.	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
CC.40.B	- Change the Department of Special Programs' name to the Department of Special Programs and Related Services.	Not Implemented	
CC.40.C	- Downgrade the position of assistant principal with district responsibilities to a head teacher position reporting to the high-school principal.	Not Implemented	
CC.40.D	- Assign district-level responsibilities for Textbook Coordination, the Vocational Education program and the Student Evaluation Program to the Department of Instruction and Special Projects.	Modified	Much of this realignment is being achieved. However, vocational education program responsibilities will remain at the high school. The vocational counselor's job descriptions will be modified to include writing, implementing the vocational grant and all related responsibilities. The director of Instruction will supervise the writing of the voc-ed grant.
CC.40.E	- Assign district-level responsibilities for Chapter 2 and At-Risk Coordination to the Department of Special Programs and Related Services.	Modified	Chapter 1 and Chapter 2 will be placed under the direction of the director of Instruction. At-risk programs will be under the direction of the director of Special Programs.
CC.40.F	- Leave supervisory responsibilities for the vocational education teachers and the voc-ed facility with the head teacher position.	Modified	See above.
CC.40.G	- Downgrade principal position at elementary or middle schools with enrollment of 300 or less to a head-teacher position.	Intact	One principal has retired and another has agreed to work half-time. A teacher on that campus will serve as lead teacher during the other half-time. As other principals retire, CCISD will provide for similar arrangements.
CC.40.H	- Assign the home school coordinator position to the Department of Instruction and Special Projects.	Intact	
CC.40.I	- Assign the head nurse position to the Department of Special Programs and Related Services.	Intact	

Rec #	Recommendations	Implementation Status	Comments
CC.40.J	- Clarify the reporting relationship of the principals. Principals should report to the assistant superintendent for Educational Operations.	Modified	This clarification will be made during administrative staff development.
CC.40.K	- The superintendent and assistant superintendent for Business and Related Services should continue to provide input on principal evaluations.	Not Implemented	CCISD gave no response to this recommendation.
CC.41	Assess the district's site-based management program and develop an implementation strategy and schedule for the delegation of additional responsibilities and decision making authority.	Intact	Site-based management training will be a component of district-wide in-service training beginning the 1993-94 school year.
CC.42.A	Contract with a grants writer. The contract could include other specific tasks (such as providing a grant-writing workshop and developing a list of possible funding sources with areas of preference). Promising projects for grant proposals include:	Intact	Some of the recommended "promising projects" are being pursued through other avenues by CCISD:
	<ul style="list-style-type: none"> - unsolicited proposals to industries in Calhoun County that would increase work force skills or help to attract workers to fill projected job vacancies. - development of identification criteria and curricula for increasing the participation of students from economically disadvantaged, limited-English-proficient and culturally diverse backgrounds in the district's Gifted and Talented Program. - a training program leading to an undergraduate degree and teacher certification for non-degreed instructional support personnel. - discretionary state funding available for the inclusion of special-education students in mainstream education programs. - a criminal justice proposal to fund a portion of the Flex Ed program. 		<ul style="list-style-type: none"> - Proposals to industries - the Partners in Education Program will pursue this. - Gifted and talented - An adapted "Javits Program" model will be started. - Special Education - Campuses have had an opportunity to apply for this through the Region 3 education service center. - Flex Education - By eliminating the Night Flex Education program and offering a high school equivalency program for drop-out recovery and for overage students, the district anticipates saving \$19,260 annually.

Rec #	Recommendations	Implementation Status	Comments
CC.42.B	Establish a vehicle for monitoring district grants administration. Implement a tracking system for program expenditures to ensure that program funds are used within the allowed time frame and carry-over funds are limited to no-more than 15 percent.	Not Implemented	CCISD feels its present grant monitoring system provides sufficient accountability.
CC.43	Consider acquiring an "executive on loan" for a year-long assignment as the district's community involvement coordinator. This would enable CCISD to strengthen its ties with businesses and community while expanding the district's resources.	Modified	This responsibility is being assumed as part of another CCISD position. The job description is being rewritten to include these duties.
CC.44.A	Consolidate administrative positions at the elementary and middle-school level. Consider closing Fannin Middle School and reassigning sixth-grade students to Seadrift Elementary and seventh- and eighth-grade students to Travis Middle School.	Not Implemented	Administrative positions may be consolidated in the future as retirements or resignations occur. At this time, no plans are being made to combine administrative positions. The closing of Seadrift Elementary is unlikely due to community opposition.
CC.44.B	Change student-teacher ratios at all campuses for grades D-4 to approach the state-mandated limit of 22:1; increase the ratio further in higher grades.	Intact	This is being implemented for the 1993-94 school year.
CC.44.C	Establish an accountability system for staff based on student performance measures (e.g., a minimum of one year's progress for one year's schooling in all grades and required subject areas) with incentives for further progress (such as bonus pay).	Not Implemented	Bonus pay is not being considered at this time. Salary structure for all employees needs to be considered during the 1993-94 school year.
CC.45	Review all available data on district staff and student performance and program offerings to ascertain the strengths and weaknesses of district personnel and students and determine specific ways to ensure an increase in student performance.	Modified	Some of this data will be reviewed during the 1993-94 year.

Data reviewed should include:

- Accreditation Report, September 6, 1991
- Longitudinal Study of CCISD Test Data, January 1993

Rec #	Recommendations	Implementation Status	Comments
	<ul style="list-style-type: none"> - All student test data for last five years district-wide, by school, grade, teacher, sex, ethnicity and socio-economic status - Texas Teacher Appraisal System (TTAS) results for the last five years district-wide, by school, grade and teacher - Principal evaluations for the last five years - Staff Development and in-service offerings for the last five years. - Staff Development Committee minutes, reports and notes - Program reports, requirements and enrollment statistics for all district programs <p>This review should examine:</p> <ul style="list-style-type: none"> - Staff and community involvement - Compliance with district mission and goals - Cost-effectiveness on a per-pupil basis - Staff development or in-service time needed - Availability of materials and equipment <p>Establish an evaluation cycle for reviewing all programs every two years.</p>		
CC.46	Fund the district's career ladder only at the levels required by the state. Funding above these levels should be based on accountability. For example, the district could institute bonus pay based on student performance.	Not Implemented	Career-ladder funding changed with passage of SB 7. District administration is currently studying its implications.

Rec #	Recommendations	Implementation Status	Comments
Special Education			
CC.47.A	Ensure that the district's site-based management systems include and make the best use of special-education personnel.	Modified	The district provided several options to campus site-based management teams. Some campuses have decided to merge children with special needs into regular classes. Content-mastery labs have been established for these students to provide intermittent help as needed.
CC.47.B	Investigate the use of technology as a management tool to save time, resources and space and free up time for direct services.	Modified	CCISD currently uses the regional service center computer cooperative (RSCCC) as a management tool.
Gifted and Talented Programs			
CC.48	Revise the program's nomination, identification and selection criteria to ensure that program enrollment reflects overall district ethnic enrollment. Implement interim selection measures until screening instruments are selected, pilot-tested and implemented.	Intact	This was done in Spring 1992. For the 1993-94 school year, the Javits model is being implemented at Roosevelt. The Gifted and Talented Committee will consider other alternatives.
Bilingual/ESL			
CC.49	Expand the scholarship program to develop teachers from the local area. Participants would receive a scholarship in return for agreeing to return and teach at CCISD schools for a specified period of time, usually two to three years.	Intact	This recommendation is being implemented.
Dyslexia			
CC.50	Acquire program brochures that explain the Dyslexia Program. The brochures should explain definitions, the identification process, treatment alternatives, regular education alternatives and provide a name and phone number for all inquiries.	Not Implemented	CCISD feels local needs for such brochures does not justify their cost.

Rec #	Recommendations	Implementation Status	Comments
Health Services			
CC.51.A	Ensure that campus-based personnel understand that nurses are available as time permits to work with parents in areas such as immunizations, nutrition and communicable diseases. Explore opportunities to work with other county health-care providers to provide more support for children who lack adequate health care.	Intact	Responsibility for more effective communication will be given to the head nurse.
CC.51.B	Work with Food Service and Chapter 1 to develop a nutritional class for parents.	Intact	The district is considering this recommendation.
Flex Education			
CC.52.A	Reduce the amount of district resources spent on this program. Assign its administration to the high-school principal, with staffing limited to 1.5 FTEs. As an alternative to this downsizing, the district may want to limit its investment and use other resources to fund additional positions. One approach would be to share the center with adjacent districts. This would increase its use while still providing the desired level of focused instruction. A second alternative would be to obtain a criminal-justice grant to offset the program's costs.	Not Implemented	CCISD maintains that early data from the Flex Ed Center indicate the program is effective. The benefits of removing disruptive students from campus outweigh the costs. Cooperative arrangements with other districts will be considered.
CC.52.B	In cooperation with middle- and high-school principals and their campus leadership teams, develop an intervention program for returning students to their home-school environment after leaving the Flex Day program.	Intact	This will be done early in the 1993-94 school year.
Personnel Management			
CC.53	Separately report budgeted amounts for the personnel budget, including amounts for recruitment efforts, staff development and other quantifiable operating costs.	Modified	The district personnel office will perform a budget analysis of expenditures in 1994 for the 1993-94 budget and submit a detailed analysis in the 1994-95 budget. The personnel office does not provide staff development; this recommendation was passed on to the director of Instruction.

Rec #	Recommendations	Implementation Status	Comments
CC.54	Continue and increase efforts to ensure that the district's staff better reflects the community and the school population. Place special emphasis on the recruitment of minority teachers, especially those who qualify to teach special programs.	Modified	The Grow-Your-Own Teacher Training Program is continuing. Efforts to seek minority employees will continue, especially for professional employees. The recruitment plan will be used again next year.
CC.55.A	Perform an internal and external study of the district's salary schedule to ensure that salary levels are equitable. Any salary schedule revisions should be independently validated to ensure their fairness to all employees.	Intact	The Texas Association of School Boards (TASB) will perform a salary survey and assist the district in designing a new salary schedule.
CC.55.B	Track and document annual turnover rates to determine whether recent high turnover was an aberration or the beginning of a significant trend.	Intact	The personnel office will keep records to track turnover.
CC.55.C	Keep all personnel files in a central location under the jurisdiction of the Personnel Department. If departments would like to keep their own files, they should make a copy of Personnel's master file.	Intact	The personnel office does keep all personnel files. The Maintenance, Transportation, and Food Service Departments keep applications on file. Once an applicant becomes an employee, the personnel office creates a personnel file for that employee.
CC.55.D	Increase staff-development efforts by providing more district-sponsored training programs. The Personnel Department should solicit employee opinions regarding the types of training desired and develop programs that respond to these needs. In the future, consider relating incentive pay to participation in training.	Modified	This recommendation was passed along to the director of Instruction.

Rec #	Recommendations	Implementation Status	Comments
CC.55.E	Require the completion of annual performance assessments by all employees. Annual performance assessments should be used as a basis for district-sponsored staff development programs. All performance assessments should note progress toward individual goals.	Modified	<p>Performance appraisals are completed for all professional employees. The district has developed 1994 job description/appraisal instruments for Transportation and Food Service personnel. Instruments for paraprofessionals and Maintenance employees will be completed in 1993-94. However, the superintendent has removed a requirement for an annual growth plan (except for administrators).</p> <p>An analysis of Texas Teacher Appraisal System (TTAS) results is being provided to the director of Instruction for use in planning staff development.</p>

Facilities Planning and Utilization

CC.56.A	Develop an updated facilities master plan, building on the August 1987 report by adding gross and net square footage for all facilities. In addition, update school boundary lines annually or as needed. The new master plan should incorporate community input and public comment. If the district chooses to use an outside consultant to perform this update, the request for proposals (RFP) should require community input and public comment as part of the study. Financing alternatives for proposed major construction projects also should also be an RFP requirement. In addition, the updated plan should include one-, five- and ten-year enrollment projections. Use these projections as a basis for recommendations contained in the plan. Use the plan to guide the district's facility maintenance program.	Intact	The master plan will be updated after the report of the CCISD Community Facilities Advisory Committee is presented.
CC.56.B	Hold an annual presentation to the board concerning the district's facility improvement and construction plan, after placing this function under the assistant superintendent for Business and Related Services. The presentation should begin with an overview of the updated facility master plan. Budget requests for facility improvement and construction projects should result from conclusions in the master plan. Circulate the plan to the general public.	Intact	This presentation will be given as needed.

Rec #	Recommendations	Implementation Status	Comments	
CC.57	Assess space use in outlying schools and consider reducing the number of teachers at some schools to produce a higher student-teacher ratio in grades K-4. For example, Point Comfort elementary could eliminate as many as four teachers through better classroom use, higher student-teacher ratios and multi-grade classrooms.	Intact	Site-based decision making committees performed this function prior to the release of TSPR's report.	
Facilities Maintenance				
CC.58.A	Update the district's facilities master plan (FMP) and use it for proactive maintenance planning.	Intact	The district plans to update the FMP after CCISD's Community Facilities Committee Report is presented.	
CC.58.B	Instigate a planned preventative maintenance program (PPM) and create schedules that document needs at each district facility.	Not Implemented	A PPM program for the district will be implemented when software becomes available.	
74	CC.58.C	Implement an automated work-order tracking system.	Not Implemented	The PPM program will be implemented when software becomes available.
CC.59	Implement a quality-control process at CCISD. Ensure that campus administrators are contacted after the process is completed to ensure that it was done to their satisfaction. Require supervisors to perform random checks of recently completed work.	Intact	This recommendation is being implemented.	
CC.60	The Maintenance Department should consider implementing split shifts for half of its staff, so that major classroom maintenance activities can take place while children are out of the classroom.	Not Implemented	The district is studying this recommendation.	
CC.61	Ensure that all emergency work orders are properly documented.	Intact	Done.	
CC.62	Perform an activity analysis to establish the need for the district's equipment-operator and welding positions.	Not Implemented		

Rec #	Recommendations	Implementation Status	Comments
CC.63	Identify opportunities to cross-train maintenance staff, thereby increasing their value to the district and enabling multiple positions to handle specific work orders.	Intact	This recommendation is being implemented.
CC.64	Consider equipping some maintenance vehicles with two-way radios to minimize time delays involved in dispatching staff to new assignments.	Modified	All maintenance staff have been issued pagers.

Custodial Services

CC.65	Report budget information for custodial services separately from other functions performed by the Maintenance Department. Budget information should include custodial wages and supplies. This information should be tracked by facility.	Not Implemented	The district responded that other auditors have advised CCISD to consolidate reporting to save time and money.
CC.66.A	Clearly define the duties that may be performed by a school custodian and communicate these responsibilities to all school principals. Most importantly, school principals should not ask custodians to supervise children during recess or lunch, since most custodians have not received the necessary training to serve as monitors.	Intact	The personnel director is working on a custodian's job description.
CC.66.B	Give custodians detailed work schedules that describe their tasks on a daily basis.	Not Implemented	According to CCISD, this is a site-based management decision.
CC.67	Establish a control system to track the cost of custodial supplies by school.	Intact	This is being done.
CC.68	Consider eliminating 3.5 full-time-equivalent custodians from schools that currently assign less than 14,000 square feet of building space to each custodian.	Not Implemented	This will not be done because CCISD wants a custodian on duty at all time during the school day.

Energy Management Program

CC.69.A	Install energy-efficient heating and air-conditioning systems in any new future district construction.	Not Implemented	The district will take this recommendation under advisement when new construction is considered.
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Rec #	Recommendations	Implementation Status	Comments
CC.69.B	Perform documented cost-benefit justifications for all investments in heating and air-conditioning equipment.	Not Implemented	This will be done when the opportunity arises.
CC.69.C	Perform a trend analysis on statistics currently maintained by the district to identify potential opportunities to conserve on utilities.	Intact	This recommendation is being implemented.
CC.69.D	Establish an energy conservation strategy that stresses the importance of energy conservation to all employees and students and holds employees accountable for lowering energy costs at their campuses.	Not Implemented	The district is considering this recommendation.

Asset Management Recommendations

CC.70.A	Ask Managed Healthcare to explain the apparent ineffectiveness of the district's Preferred Provider Organization.	Not Implemented	CCISD maintains that its providers (except De Tar Hospital and Herman Hospital) have refused to honor the contract.
CC.70.B	Change risk program funding to include reserve changes, fixed costs and expected claims plus a margin for claim fluctuation. (A reasonable margin is 10 percent of expected claims.) If CCISD terminates the plan for any reason, the medical program should be fully funded. Require Confederation Life to calculate the required reserve.	Intact	Done.
CC.70.C	Review the methodology used to calculate COBRA rates to ensure its correctness.	Intact	Done.
CC.70.D	Require prescription drug providers to provide the district with appropriate management reports. Use these reports to measure the effectiveness of the district's prescription services.	Intact	Done.
CC.70.E	Determine whether the most advantageous stop-loss levels have been purchased. While increasing these levels will increase CCISD's liability, the savings may offset additional risk. Require Confederation Life to justify its increases for administration and life insurance.	Not Implemented	CCISD considered raising the stop-loss level but did not feel that it could take additional risk.

Rec #	Recommendations	Implementation Status	Comments
CC.70.F	Implement a preventive health maintenance program.	Intact	Current insurance allows up to \$225 per year for routine physicals.
Other Risk Management			
CC.71	Using existing personnel, establish a formal risk-management function in the district. This function should include tracking and analysis of accidents, annual safety inspections of all facilities and annual evaluation of insurance coverages and related risks. TSPR recommends that the assistant superintendent for Business and Related Services be assigned to supervise this function. Responsibility for various specific functions should be assigned to current staff.	Not Implemented	The district is reviewing this recommendation.
CC. 72	Consider raising the insurance deductible on district properties from \$5,000 to \$20,000 or even \$50,000 per occurrence. The district also should consider bidding insurance coverage jointly with other school districts to lower overall costs.	Not Implemented	The district is reviewing this recommendation.
CC.73	Expand the duties of the district safety officer to include risk-management functions such as the analysis of accident reports and formal safety inspections. This position also should be responsible for the development of a district emergency plan.	Not Implemented	The district will consider this recommendation in the future.
CC.74.A	Immediately inspect all facilities to ensure that doors are not chained when staff or students are in the building. All staff should be trained in the risks associated with blocked exits. Make campus principals accountable for this training.	Intact	The district agrees and is implementing this recommendation.
CC.74.B	Tag all fixed assets that are moveable or of special concern, such as computers and media equipment.	Intact	The district is in the process of tagging all equipment.
CC.74.C	Solicit bids for district audit services. Bid specifications should address how the auditor will avoid potential conflicts of interest and include internal audit activities that may be provided in addition to standard external financial auditing.	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
CC.74.D	Either expand the role of the district's external auditor to include internal audit functions, or separately obtain internal audit capabilities. An internal audit function should include formal auditing of activity funds, training of district staff in accounting procedures, development of an account manual and operational reviews of various district functions.	Modified	This is being done by the district accountant.

Cash Management

CC.75.A	Develop formal cash-management policies and procedures that establish performance goals for the district. Policies and procedures should expressly state anticipated investment yields and a recommended mix of different investment vehicles in the district's portfolio.	Not Implemented	The district is reviewing this recommendation. Given the current favorable terms of CCISD's depository contract, it may not be necessary to alter the type of investments the district uses.
CC.75.B	Evaluate the district's contract with the Calhoun County Appraisal District for tax-collecting services to ensure that their method of charging the school district is equitable. TSPR recommends that entities served by the appraisal district change the basis of charges to reflect a cost-per-parcel item, so that the costs of collection can be evaluated against costs for similar operations.	Not Implemented	
CC.75.C	Evaluate the advantages of implementing an automated cash-flow forecasting system that would enable the district to maximize its return on investments. While savings under the current depository contract would not offset the time and expense of implementing and maintaining a system, terms for the next depository contract could make this much more beneficial.	Not Implemented	The district is considering this recommendation.

Technology Systems

CC.76	Create and fill an instructional computing specialist position with specific responsibility for supporting the district's instructional technology function. Duties would include holding training sessions for district users, maintaining an inventory of current applications available on the market and supporting the district's multiple computer labs.	Not Implemented	The district is considering this recommendation.
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Rec #	Recommendations	Implementation Status	Comments
CC.77	Obtain bids on all significant investments in computer hardware and software. These bids should be comprehensive, providing quotes for all hardware and software necessary to satisfy the need being addressed. Perform a cost-benefit justification for all hardware investments. Acquire premium equipment only when the investment can be justified.	Intact	This recommendation is being implemented.
CC.78.A	Investigate the causes of poor support provided by the district's local technology vendor and require improvement before retaining the vendor in the future.	Not Implemented	The district is considering this recommendation.
CC.78.B	Ensure that all future technology investments fit into the district's approved five-year plan, meet a specific district goal or satisfy a particular need. Assess each investment's potential impact on the five-year plan.	Not Implemented	The district is considering this recommendation.
CC.78.C	Reallocate district hardware to ensure that user needs are satisfied by the proper applications, and that applications run on the proper hardware platforms. Devise technology distribution strategies to maximize the impact of the district's technology investments.	Not Implemented	
CC.79	<p data-bbox="331 932 947 956">Formalize a disaster recovery plan that provides for:</p> <ul data-bbox="380 995 1024 1267" style="list-style-type: none"> <li data-bbox="380 995 1024 1059">- an alternate processing capacity with a compatible system. <li data-bbox="380 1102 1024 1166">- availability of backup files needed to resume daily processing. <li data-bbox="380 1209 1024 1273">- assignment of specific recovery responsibilities once the plan is engaged. <p data-bbox="331 1310 1066 1404">The disaster recovery plan should be tested on an annual basis to ensure that it can reinstate processing of CCISD's applications and current daily transaction volume.</p>	Not Implemented	The district is considering this recommendation.

Rec #	Recommendations	Implementation Status	Comments
CC.80	<p>Periodically update the current five-year technology plan to address:</p> <ul style="list-style-type: none"> - Automation needs and opportunities by order of priority - System capacity requirements - Specific hardware requirements - Specific software needs and availability - Staffing requirements and costs - Cost-effectiveness of contracted processing versus in-house processing - Technology standards - An implementation schedule for all aspects of the plan <p>Updating the plan will provide necessary direction for allocating technology resources consistent with the district's long-term needs. Develop and maintain the plan with input from the steering committee and board approval. Present annual progress reports to the board and note any modifications to the original plan.</p>	Intact	This recommendation is being implemented.
CC.81.A	<p>Ensure that all software applications are properly licensed by creating a district-wide software licensing policy. Either remove unlicensed applications from district computers or invest in the required number of copies to bring the district into compliance. Explore opportunities for negotiated site licenses with various software authors.</p>	Not Implemented	The district is considering this recommendation.
CC.81.B	<p>Secure the central office and high-school administrative file servers. Restrict access by locking machines in a secure room or adequately ventilated cabinets.</p>	Not Implemented	The district is considering this recommendation.

Rec #	Recommendations	Implementation Status	Comments
CC.81.C	<p data-bbox="327 167 1066 228">Develop a data-processing operations procedures manual that outlines procedures governing the following key topics:</p> <ul style="list-style-type: none"> <li data-bbox="375 272 747 298">- Specific computer operations <li data-bbox="375 343 779 368">- Special data processing requests <li data-bbox="375 413 984 438">- Installation of new programs or program changes <li data-bbox="375 483 884 509">- Physical security of computer equipment <li data-bbox="375 553 716 579">- Data retention and storage <li data-bbox="375 624 783 649">- Technical support from vendors <li data-bbox="375 694 772 719">- Backup and restoration process <li data-bbox="375 764 552 790">- Emergencies 	Not Implemented	The district is considering this recommendation.
CC.82	Consider interfacing the Administrator Plus system with the RSCCC system. Eliminate dual data entry whenever possible.	Not Implemented	The district is considering this recommendation.
CC.83	<p data-bbox="327 930 1066 1058">Maintain a current computer hardware and software inventory. The inventory should include all types of computer equipment (personal computers, printers, backup devices, etc.) and feature the following data:</p> <ul style="list-style-type: none"> <li data-bbox="375 1102 705 1128">- Machine make and model <li data-bbox="375 1173 993 1233">- Machine configuration (memory, storage capacity, processor speed, etc.) <li data-bbox="375 1278 674 1303">- Machine serial number <li data-bbox="375 1348 806 1374">- CCISD fixed-asset tracking number <li data-bbox="375 1418 905 1444">- Machine price and date machine acquired 	Intact	This recommendation is being implemented.

Rec #	Recommendations	Implementation Status	Comments
	<ul style="list-style-type: none"> - Current location and user of machine - Any preventive maintenance dates associated with the machine <p>An appropriate software inventory would include:</p> <ul style="list-style-type: none"> - Name and version number of the application - Serial numbers - Type of software (i.e., spreadsheet, word processing, database) <p>These inventories will allow the district to track its assets, facilitate compliance with vendor license agreements, permit accurate scheduling of preventive maintenance and quantify the district's investment in computer technology.</p>		
CC.84.A	Consider networking the district to the central office through a wide-area network (WAN) over the next 35 years. All campuses eventually should be linked to the central office and able to readily access all necessary budget and student data.	Not Implemented	The district is considering this recommendation.
CC.84.B	Upgrade file servers at the high school to enable the most current version of their standard application to be processed. Configure the machines with additional disk space and memory to facilitate the processing of new software releases.	Not Implemented	The district is considering this recommendation.
CC.84.C	Find and secure adequate space for the storage and repair of the district's computer hardware. The district may choose to renovate the current workroom or find new space in the district.	Intact	Done.

**Implementation
Status**

Rec #

Recommendations

Comments

Accounting

CC.85	Develop a formal accounting manual that provides specific instructions on all accounting polices and procedures. This manual should be specific enough to assist a school secretary and also should outline duties and tasks performed in the Finance Department. The accounting manual also should include approved purchasing practices for teachers.	Intact	CCISD has a manual in place and has trained principals, department heads and secretaries in its use. The district will consider providing more detail in the manual and holding more training sessions.
CC.86	Reassign a portion of the cash-receipt functions performed by the chief accountant to other positions. Cash should be received and receipts issued by another position, such as a payroll clerk or bookkeeper. The chief accountant could continue to prepare the district's deposits and take them to the bank.	Modified	The writing of cash receipts has been reassigned to a payroll clerk.
CC.87.A	Evaluate monthly reporting requirements to determine whether expanded use of program codes provided by the finance system can meet needs expressed by the superintendent. Determine if a report writer is available from RSCCC. This would allow the district to create custom reports which may more effectively present needed information. If this tool is not currently available from RSCCC, the district should request that this feature be added.	Intact	CCISD will attempt to use as few sub-funds as possible. Many ways are available to run necessary reports without using an abundance of extra codes.
CC.87.B	Modify monthly closing procedures so that the board can receive timely information. The Finance Department should move its closing date from the fourth or fifth day of the present month to the last day of the previous month, so that reports can be prepared in time to meet board agenda deadlines. Routine payables and receivables should be processed by the 27th or 28th of the month.	Not Implemented	CCISD maintains that it cannot close its finance books on the last day of the month because too many items would be left outstanding that should be shown on that month's reports. When regular board meetings were moved from the fourth Tuesday to the second Tuesday of the month, it became impossible to get financial reports complete for inclusion in the agenda.
CC.88	Expand current activity-fund reviews to include the preparation of a formal written report outlining review objectives, performance measures, work approach used and review results. Provide this information to the assistant superintendent for Business and Related Services and school principals.	Not Implemented	The activity funds need to be revised at least annually by the chief accountant. At the present, that position has a workload that makes it very difficult, if not impossible, to visit all 12 campuses and audit their books.

Rec #	Recommendations	Implementation Status	Comments
CC.89	Keep check stock, keys to the check signer and the signature plate in a secure locked cabinet or vault except when in actual use. Require the chief accountant to maintain and periodically review a check log to ensure that no checks are missing.	Intact	A locked cabinet has been built in the vault and the check stock and signature plate are kept there. All check copies are kept in numerical order by a bookkeeper and frequently reviewed to ensure that no checks are missing or out of order.

Budget Process

CC.90.A	Develop a formal budget calendar that calls for budget activities to begin in the fall of each year and for complete adoption of (at least) a preliminary budget by July 1 of each year.	Not Implemented	
CC.90.B	Restructure budget documents so that personnel costs are evaluated in the same way as non-personnel costs.	Intact	This procedure was followed in preparing the 1993-94 budget.
CC.90.C	Evaluate alternative financing of new school construction and major renovations through the use of private funding and long-term debt.	Not Implemented	

Cherokee ISD

Period of TSPR review: 5/91-7/91

Consultant: MGT of America, Inc.

Estimated savings from TSPR recommendations: \$44,000

Rec #	Recommendations	Implementation Status	Comments
I. Community Involvement			
C.1	Increase citizen input into district operations and increase attendance and participation in school board meetings.	Not Implemented	
C.2	Prepare and disseminate a brochure with key facts and figures concerning CISD's performance abstracted from TEA's annual performance report.	Not Implemented	The district has stated that existing TEA data is not sufficiently detailed to be useful.
85 C.3	Identify a volunteer coordinator and increase use of volunteers to assist classroom teachers.	Intact	Volunteers are being informally coordinated through the superintendent.
II. District Organization and Management			
C.4	Ensure that district fund balances are not excessive.	Not Implemented	The district does not feel that its fund balances are excessive.
C.5	Reconcile differences in financial figures reported in CISD's independent auditor's report and TEA's annual performance report.	Intact	For the last two years, the district has asked an external accountant to help them to reconcile their books at the end of the year. Error rates have improved since implementation.
C.6	Use the district's independent auditor's report as the basis for beginning balances in the annual budget.	Intact	The independent auditor's report is being used as the basis for beginning balances in the annual budget.
C.7	Offer all employees at least a partially funded health insurance program.	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
C.8	Provide student athlete insurance.	Not Implemented	
C.9	Eliminate the high school principal's position and have the district superintendent assume these responsibilities.	Not Implemented	The district has hired a new full-time principal.
III. Personnel Management and Development			
C.10	Develop and provide all employees with a personnel policies and procedures handbook.	Not Implemented	
IV. Educational Support Programs and Service			
C.11	Immediately employ a part-time guidance counselor.	Not Implemented	The district has been unable to locate and hire a suitable counselor.
V. Educational Service Delivery			
C.12	Reinstate a vocational education program to meet the needs of students not attending college.	Not Implemented	The district has not reinstated a vocational education program, stating that transportation and other costs would be prohibitive; TSPR believes the benefits would outweigh the costs.
C.13	Implement a Limited English Proficiency (LEP) program to meet the needs of Hispanic students.	Intact	An ESL teacher has been hired.
C.14	Redesign the Gifted and Talented Program to serve all eligible students.	Intact	Done
VI. Administrative/Operational Services			
C.15	Immediately repair plumbing problems in the restrooms, deteriorated classrooms in the high-school building and air conditioner malfunctions.	Intact	The district has hired a new janitor to perform minor repairs and added a new facility.
C.16	Develop and implement a written long-range facilities and grounds improvement plan.	Not Implemented	
C.17	Develop administrative procedures manuals in the areas of maintenance, food services, and transportation.	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
C.18	Develop and follow preventive maintenance schedules for all district facilities and equipment.	Modified	Although the district does not have a formal preventative maintenance plan, it has added to an extensive array of maintenance contracts.
C.19	Solicit bids for food items from several vendors. Place responsibility for all food purchases with the superintendent.	Intact	CISD has entered into a food-purchasing cooperative with Mason ISD.
C.20	Discontinue the practice of having bus drivers pay their own substitutes.	Intact	
C.21	Take immediate steps to reduce transportation costs.	Not Implemented	The district disagrees with this assessment, holding that its transportation costs are high because routes are widely dispersed and the number of children served is relatively small.

Dallas ISD

Period of TSPR review: 12/91-6/92

Consultant: MGT of America, Inc.

Estimated savings from TSPR recommendations: \$60,571,000

Rec #	Recommendations	Implementation Status	Comments
Community Involvement - Citizen Advisory Function and Public Information			
D.1	Continue the district's current program of citizen advisory committees and ensure that the committees receive timely information on major district functions and activities.	Intact	The use of citizen advisory committees has been continued and expanded to include the Superintendent's Advisory Committee. The schedule of meetings is included in a special file developed to document DISD's response to TSPR's recommendations.
∞ Community Involvement - Public Information			
D.2	Modify the superintendent's annual report to the community and staff to include the district's goals and objectives and the extent to which each goal was met during the year. The report also should list ways in which the public and staff might help to improve areas in which goals and objectives are not being met.	Intact	The superintendent's annual report will include a list of district goals and objectives, as well as a report on progress toward each goal. The report also will suggest ways the staff and community can help accomplish improvement in areas where goals are not being met. The first of these reports was circulated in 1992.
Community Involvement - Community Support and Public Education			
D.3	Adopt, as a top priority, the restoration of public confidence in the district's ability to manage its business affairs.	Intact	The superintendent's request for this audit indicates the high priority given to restoring public confidence in the district's business affairs. Other efforts will be employed to create and maintain public confidence. A marketing plan has been developed and is being implemented.

Rec #	Recommendations	Implementation Status	Comments
D.4	<p>Establish a specific plan to restore public confidence in the district's ability to manage its business operations. The plan must significantly improve the management of district resources and should include:</p> <ul style="list-style-type: none"> - the establishment of a strong internal auditing program to systematically examine the operations of all administrative and support areas. - the use of formal work-management system principles to redesign all DISD administrative and support management processes to ensure appropriate management controls and install more efficient operating procedures. - the development and enforcement of written policies and procedures in all administrative and support services areas. - the establishment of a new management culture emphasizing management efficiency and strict adherence to sound policies and procedures. - the establishment and adoption by the board of a specific plan and time schedule for implementing the recommendations in this report, with possible outside review progress reports due six months, 18 months and two years after the start of the 1992 fiscal year. - quarterly reporting to the board on the progress made in implementing the recommendations in this report. - the application of appropriate disciplinary actions when board members and administrators violate district policies and procedures. 	Intact	Strategies for restoring public confidence will include the recommendations from this review. Again, the Communications Department has developed a marketing plan.

Rec #	Recommendations	Implementation Status	Comments
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District Organization and Management - Policies and Regulations

D.5	Develop a plan to significantly decrease the number of hard copies produced of the district's policy manual and periodic updates. TSPR suggested approximately 300 (one per school and 100 for the district office).	Intact	As the on-line computer version of the policies becomes fully functional, policy manuals will be called in from all personnel except principals and central-office personnel of grade four and above. The number of manuals maintained on hard copy will be about 300, as recommended.
D.6	Place major responsibility for policy and regulation administration, development and dissemination with a senior-level administrator.	Intact	The secretary of the Board of Education has been given major responsibility for policy and regulation administration, development and dissemination.

District Organization and Management - School Board Governance, Meetings, Minutes, and Records

D.7	Modify school board policy to reflect a new work structure devised by the board and TEA.	Intact	Local board policy was revised to reflect the new board work structure on May 1, 1992.
D.8	Continue efforts to improve board relations with the district administration.	Intact	Efforts to improve relations with district administration began with the creation of the board's Ad Hoc Governance Committee under the leadership of Chair Trini Garza. The committee adjusted various policies to improve relations.
D.9	Promote activities to improve relations among board members by working with the TEA monitor to create an appropriate district governance system.	Intact	Efforts to improve relations among the board and district administration continue through the board's Ad Hoc Governance Committee. The TEA monitor filed a final report in December 1992. The status of the governance system will be determined by the Board of Education.

District Organization and Management - District Administration

D.10	The superintendent should continue to directly supervise all area directors, who in turn supervise all school principals. This structure maintains the superintendent's organizational goal of having only one managerial layer between the superintendent and principals.	Intact	This recommendation has been implemented. The superintendent will continue to directly supervise all area directors, who in turn will continue to supervise all school principals.
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Rec #	Recommendations	Implementation Status	Comments	
D.11	To reduce the number of other staff reporting directly to the superintendent, assign the deputy superintendent responsibility for supervising all district administrative and support functions except internal audit, planning and budgeting and the desegregation monitor.	Intact	A reorganization has been developed to share the superintendent's reporting functions with the deputy superintendent. Moreover, the 1993-94 reorganization reflects a division of certain reporting functions between an associate superintendent for Management and an associate superintendent for Curriculum and Instruction.	
D.12	Group the financial, purchasing, personnel, MIS, and warehousing offices into a single Administrative Services Division reporting directly to the deputy superintendent.	Intact	With the exception of the personnel and MIS offices, the Management Services Division reports directly to the superintendent for Management.	
D.13	Group the Budget Office (currently in Budget and Financial Management) and Evaluation and Planning Services (except for Program Evaluation) into a single Planning and Budgeting Office reporting directly to the superintendent.	Intact	A new strategic Planning Office was added to the Management Division Services in the 1992-93 school year.	
92	D.14	Create an Office of Instructional Services reporting directly to the deputy superintendent, with supervisory responsibility for curriculum and instruction, special instruction, training and development and program evaluation.	Modified	Curriculum and Instruction Services and Special Instructional Services now report to the associate superintendent for Curriculum and Instruction.
D.15	Create a Support Services Division, reporting directly to the deputy superintendent, responsible for services including:	Intact	The district's support services departments report directly to the associate superintendent for Management.	
	- Maintenance services			
	- Transportation			
	- Custodial services			
	- Vehicle and equipment repair services			
	- Facilities design and construction			
	- Food services			
	- Security			

Rec #	Recommendations	Implementation Status	Comments
D.16	Create an Internal Audit Division, reporting directly to the superintendent, by transferring internal auditing from Financial Management.	Intact	A Department of Internal Auditing is in place. Two additional auditors already have been hired. Nine auditors will report to the superintendent. The annual audit plan is in development. Its completion will occur in concert with the district's strategic plan. A 5-percent reduction of district-level staff has been accomplished. Forty-four positions were eliminated.
D.17	Create a Division of Governmental and Public Relations, reporting directly to the deputy superintendent, by combining the current Offices of Governmental and Internal Relations and Communications.	Not Implemented	The Personnel Department and the Governmental and Internal Relations Department have been combined. The district did not see the logic in including Communications and has no plans to do this.
D.18	Adopt a policy of basing each administrative and support unit's budget on workload measures that will reduce the district's number of administrative and professional positions.	Intact	The district will employ a work-management consultant to study the goal of streamlining administrative and professional positions. Bid specifications for the consultant have been prepared.
D.19	Review all current committees and eliminate those that do not serve an important coordinating role. To the extent possible, administrative decision-making responsibilities should be assigned to individuals, not committees. Further, all committee meeting schedules should be reviewed to reduce the frequency of meetings as much as possible.	Intact	Done.
D.20	Modify the superintendent's contract and evaluation process to ensure that the superintendent is held accountable for student achievement and other specific DISD goals and objectives. Tie the superintendent's compensation to the achievement of specific performance goals that may include progress made toward implementing the recommendations in this report. (Similar accountability recommendations are recommended for school principals and area directors in the following section.)	Intact	The superintendent will develop a plan based on the concept that all administrators ought to share in the rewards. Rewards will be given to those who exceed a baseline tied to the superintendent's school-year data. Target date: January 1994.

Rec #	Recommendations	Implementation Status	Comments
D.21	Set a goal of reducing district-level personnel by 5 percent over the next three school years (1992-93, 1993-94, 1994-95), as the district fully implements school-centered education.	Intact	Accomplished September 1, 1993.
District Organization and Management - School Organization and Management			
D.22	<p>Fully develop and distribute a set of school-centered education (SCE) policies and procedures, including:</p> <ul style="list-style-type: none"> - delegation of budget authority to school principals. - delegation of personnel evaluation, hiring, promoting, and termination authority to principals. - delegation of instructional program decisions to principals. - delegation of other authorities, as appropriate. - changes in existing policies and procedures that conflict with SCE. - necessary training for principals and other personnel concerning the proper implementation of SCE. 	Intact	The district will continue to develop and refine policies and procedures regarding the delegation of authority, personnel evaluation, instructional program and training related to SCE. An SCE handbook was revised with input from the ten pilot school principals and the executive team and circulated in January 1993.
D.23	<p>Establish and distribute a plan for all schools to be on the SCE program by August 1, 1994. This includes:</p> <ul style="list-style-type: none"> - setting a specific date for each school to become a SCE school. - mandating activities that each school must complete prior to becoming an SCE school. 	Intact	An SCE timeline approved by the Board of Education on September 16, 1991, provides an orderly sequence to be completed by 1995-96. The timeline for full implementation of SCE was developed by area directors and principals and circulated in December 1992.
D.24	Seek necessary waivers from the federal court to facilitate SCE implementation.	Not Implemented	No waivers from the requirements of the federal court have been sought. The district sees no advantage in doing so.

Rec #	Recommendations	Implementation Status	Comments
D.25	As part of the SCE program, continue and improve the district's current policy of establishing annual educational performance goals (test scores, drop-out rates, etc.) for each school and hold school administrators responsible for meeting those goals. When goals are consistently unmet, terminate or demote the responsible administrators. When goals are exceeded, award school administrators and teachers with bonuses.	Intact	Currently, annual educational performance goals are established for each school. Administrators are held accountable and staff members are eligible for incentive awards. Refinements in the program will continue.
D.26	As part of the SCE program, implement current plans to hold area directors accountable for school performance in their areas. When schools in an area consistently fall short of their goals, demote or terminate area directors. Similarly, when the area schools consistently exceed their performance goals, the directors should receive bonuses.	Intact	Area directors will continue to be held accountable for school performance in their areas. A reward system linked to student achievement will be developed. The School Improvement Performance System and an appraisal system will be used to assess area directors.
D.27	Design and implement a "bottom-up" evaluation by the schools of area and district office resources and services that facilitate SCE.	Intact	The district has implemented a school-conducted evaluation of area and district office resources.
D.28	Establish a method for schools to purchase central-office services by allocating a larger portion of the district's budget to school centers and authorizing the schools to purchase services from the district offices or external service providers as needed.	Intact	Increased campus allocations for supplies and materials, libraries, counselors, laureate teachers and other staff have been made for the coming year. A procedure was implemented for the 1993-1994 school year allowing schools to purchase as much as 10 percent of general supplies without going through the normal procurement process.
D.29	Provide specific training in school-centered education for all school administrators and support staff.	Intact	Specific training is in progress for all school administration and support staff.
D.30	Reevaluate principal and district administrator compensation in light of changing responsibilities under SCE.	Intact	Compensation parity was implemented in the 1993-94 budget.

Rec #	Recommendations	Implementation Status	Comments
District Organization and Management - Work Management			
D.31	<p>Place a high priority on conducting detailed work-management improvement reviews of all routine administrative processing and support operations. The reviews should include:</p> <ul style="list-style-type: none"> - elimination of duplicative or unnecessary work steps. - proper sequencing of work steps to avoid mistakes and increase efficiency. - elimination of work-flow bottlenecks. - elimination of idle staff time. - enforcement of sound management policies and procedures. 	Intact	Work-management and improvement reviews have been scheduled for the Maintenance Services area during the 1993-94 school year.
D.32	Develop budget allocation formulas that use workload estimates and productivity standards to determine the budgets for all central-office administrative and support areas. Standards should be developed as a step in installing sound work-management systems.	Intact	This recommendation will be implemented upon the completion of management reviews conducted by an external consultant. Scheduled for the 1993-94 school year.
D.33	<p>Install formal work-management systems in all appropriate administrative and support services areas. These should include:</p> <ul style="list-style-type: none"> - establishment of expected "should-take" time for major tasks. - budget allocation based on workloads and "should-take" time estimates. - measurements of staff productivity. 	Intact	Formal work-management systems are scheduled to be implemented in the Maintenance Services area during the 1993-94 school year.

Rec #	Recommendations	Implementation Status	Comments
	<ul style="list-style-type: none"> - personnel evaluations based on productivity. - planned management of workload flows and idle staff time during low workload periods. 		
D.34	Establish a core staff of five analysts in the internal auditor's office to conduct ongoing work-management improvement studies of DISD operations.	Intact	Five work-management specialist internal auditors have been identified from the district's core staff of nine auditors.

District Organization and Management - Planning and Budgeting

D.35	<p>Create a new Office of Planning and Budgeting reporting directly to the superintendent, by transferring the following existing units to the new office:</p> <ul style="list-style-type: none"> - Budget unit from the current Office of Budget and Financial Management - Planning unit from Planning and Evaluation Services - Statistics unit from Planning and Evaluation Services - Statistics and planning staff from Plant Operations 	Intact	A new office of Budget/Finance and Planning was created for the 1992-93 school year. The new Management Division now incorporates the Offices of Budget, Finance, and Strategic Planning.
D.36	<p>The new Office of Planning and Budgeting should annually study the efficiency and effectiveness of the district's delivery system and operations. The study should include analyses of:</p> <ul style="list-style-type: none"> - Space utilization - Operating costs per student for each school - The effectiveness of each school - The cost-effectiveness of special instructional programs and support programs - Cost-effectiveness of consolidating schools (especially magnet schools) 	Intact	The Office of Strategic Planning is now a part of the Management Division. Among its many responsibilities, the Strategic Planning Office currently is facilitating the district's development of a long-term strategic plan.

Rec #	Recommendations	Implementation Status	Comments
D.37	<p data-bbox="375 196 884 220">- Cost-effectiveness of the learning centers</p> <p data-bbox="327 268 648 292">The new office also should:</p> <ul data-bbox="375 336 1073 571" style="list-style-type: none"> <li data-bbox="375 336 1073 432">- annually develop proposed structural, policy, procedural and organizational changes to improve operational efficiency and effectiveness. <li data-bbox="375 480 1073 571">- produce an annual report tracking changes in operational efficiency and effectiveness for each school and central office agency. <p data-bbox="327 616 1073 711">The new Office of Planning and Budgeting should develop and annually update a comprehensive three-year DISD structure and operational plan that includes:</p> <ul data-bbox="375 756 884 1544" style="list-style-type: none"> <li data-bbox="375 756 621 780">- Performance goals <li data-bbox="375 828 800 852">- Enrollment projections by school <li data-bbox="375 900 842 924">- Planned changes in attendance zones <li data-bbox="375 971 716 995">- New schools to be opened <li data-bbox="375 1043 695 1067">- Old schools to be closed <li data-bbox="375 1115 800 1139">- Needed portables for each school <li data-bbox="375 1187 753 1211">- Staffing levels for each school <li data-bbox="375 1259 749 1283">- Budget levels for each school <li data-bbox="375 1331 848 1355">- Workloads for central office functions <li data-bbox="375 1402 884 1426">- Staffing levels for central office functions <li data-bbox="375 1474 879 1498">- Budget levels for central office functions <li data-bbox="375 1538 642 1562">- Revenue projections 	Intact	The Office of Strategic Planning is currently updating the district improvement plan (DIP) and school improvement plans (SIP), and developing a strategic planning process for the district, with completion scheduled for October 1993.

Rec #	Recommendations	Implementation Status	Comments
D.38	<p>The new Planning and Budgeting Office should annually oversee the development of all district and school improvement plans (DIPs and SIPs) and ensure that these plans are integrated into the comprehensive three-year planning and annual budgeting process by:</p> <ul style="list-style-type: none"> - timing the completion of DIP and SIPs to coincide with the beginning of the annual comprehensive plan update and annual budget development process. - expanding the resource implication section of the DIP and SIPs to include: <ul style="list-style-type: none"> • additional staffing needs by budget year. • additional operating budget needs by budget year. • additional capital budget needs by budget year. 	Intact	<p>The current DIP and SIPs were developed for a three-year period and designed for annual updating. Annually, as priority improvement targets are identified or refined, they are integrated into the planning and budgeting process. The 1993-94 budget reflects approximately \$2 million in resources allocated for priority improvement in low performing schools. As stated above, the Office of Strategic Planning is currently updating the DIP and SIP and developing a strategic planning process.</p>
D.39	<p>Alter the format of the district and campus improvement plan to:</p> <ul style="list-style-type: none"> - establish specific school and district performance goals. - identify specific programs and activities to accomplish each goal. - identify by year and organizational entity the budget requirements to implement specific programs and activities. 	Intact	<p>The format for district and school improvement plans will be altered during the 1993-94 school year when they are replaced by the district strategic plan and school tactical plans. During the 1992-93 school year, district staff were trained as internal facilitators and a proposal for a strategic planning process was developed. As indicated above, the Office of Strategic Planning currently is updating the DIP and SIP and developing a strategic planning process for the district.</p>
D.40	<p>The Planning and Budgeting Office should produce an annual progress report showing how well each school and the district as a whole are achieving established performance goals.</p>	Intact	<p>The Department of Program Evaluation and Accountability Services will produce reports on the achievement of DISD performance goals at six-week intervals. Effectiveness Indices are complete for 1992-93. Accountability and accreditation goals are complete and have been sent to the schools.</p>

Rec #	Recommendations	Implementation Status	Comments
D.41	<p>Improve the format of existing budget documents to provide more information, including:</p> <ul style="list-style-type: none"> - total funds, by fund source category, allocated to each school and central office agency. - actual expenditures and revenues for the two years prior to the budget year and estimated expenditures for the year prior to the budget year. - workloads for each school and central office agency for the two prior years and the budget year. - cost per workload for the two prior years and the budget year. 	Intact	<p>Budget documents will be improved to provide additional information as suggested in this recommendation. Each year's budget cycle includes a review and refinement of the existing budget documents, based on user input. The 1994-95 budget cycle is beginning and additional refinements will be made in documents for use this year.</p>
D.42	<p>Petition TEA to reduce the number of functional expenditure categories that require board approval for budget amendments to a more manageable number (e.g., four or five).</p>	Intact	Done.
D.43	<p>Establish a formal process for obtaining, at the beginning of each annual planning and budgeting cycle, board input on and approval of performance goals and planning and budgeting guidelines and priorities.</p>	Intact	<p>A new process for budget planning was developed for the 1991-92 school year. A preliminary meeting for board input on the budget was held during the 1993-94 budget cycle. A November 1993 board meeting is planned for input on the 1994-95 budget.</p>
D.44	<p>Prepare and distribute to all budget managers a written set of budget-control policies and procedures.</p>	Intact	<p>DISD will refine and continue to distribute written budget control policies and procedure to all budget managers. Written guidelines, policies, and information currently are being prepared for the 1994-95 budget.</p>

Rec #	Recommendations	Implementation Status	Comments	
District Organization and Management - Financial Management				
D.45	Implement a cash forecasting process that includes daily and weekly forecasts for periods of at least six months.	Intact	This recommendation is being implemented in the district treasurer's office. During the previous fiscal year, manual calendars were maintained for payroll dates and investment maturities. Projections of monthly cash flows were prepared on a periodic basis. Improved cash forecasting has been addressed as part of the process reengineering. A database of historical information and an Excel spreadsheet model are being created to provide a multi-month projection.	
D.46	Make six-month projections to ensure that the proper alternative for investment maturity is chosen for short-term working capital investments.	Intact	This recommendation will be implemented; see above.	
101	D.47	Bid a property tax collection contract.	Intact	Done. A review of collection rates did not justify a change for the 1993-94 school year.
D.48	Develop a process for monitoring property tax collections and the transfer of funds to DISD.	Intact	This process was in place in the 1992-93 school year. The amount is determined daily and verified by bank confirmation document.	
D.49	Develop and implement a campaign aimed at substantially increasing employee participation in the automated deposit program for payroll.	Intact	Beginning with the 1992-93 school year, all new employees are required to participate in the automated deposit program. Existing employees are encouraged to participate. Problems will occur with employees who do not have checking accounts. This obstacle must be overcome prior to the development of necessary board policies and administrative regulations.	

Rec #	Recommendations	Implementation Status	Comments
D.50	Implement a controlled payment-date procedure for the release of checks on their respective due dates, to retain money longer.	Intact	This was addressed as part of the district's process reengineering. Accomplishing this through automation will require system modifications that have not yet been implemented. On a manual basis, some large-dollar items are scheduled for payment on actual due dates. System modifications will be addressed and scheduled subject to the actions and recommendations of DISD's technology committee.
D.51	Establish a filing system (manual or automated) in which invoices are filed by due dates and checks are generated according to those dates.	Intact	This recommendation will be implemented in conjunction with above recommendation.
D.52	Establish a controlled disbursement account for payroll disbursements. This account would be funded only as checks drawn on it are presented for payment.	Intact	Meetings to discuss the implementation and pricing of a controlled disbursement account are under way.
D.53	Conduct a review to determine whether the district should pay hard-dollar fees for bank services, rather than compensating balances.	Intact	A review of banking practices will be conducted with the goal of maximizing DISD investments. While DISD investments no longer receive a guaranteed yield of 6 percent (after August 31, 1993), hard-dollar fees have been determined to be preferable for the district as long as investment rates continue to exceed the rate earned by bank accounts. Efforts to minimize bank balances are being initiated and a search for optional overnight investments will be made.
D.54	When banking relationships are bid, request banks to suggest improvements in account structures and processes that will increase interest income.	Intact	Suggestions for improvements in these areas are made on regular basis by DISD's bankers. Suggestions for improvements also were made in response to the district's request for bids this past summer. In addition, the district is expanding its efforts to gather further suggestions from the brokerage community.

Rec #	Recommendations	Implementation Status	Comments
D.55	Periodically request the district's bank to run an account analysis of performance to ensure that excess dollars are not held in low-interest-bearing accounts.	Intact	The bank provides an account analysis on a regular basis.
D.56	Adopt the investment instruments available in the Texas Investment Act.	Intact	District investment policy will be revised to adopt instruments available under the Texas Investment Act.
D.57	Consider adding longer-term maturities (with a maximum term of two years) to the district's portfolio. Under normal yield-curve circumstances, extending maturity improves overall yields.	Intact	The district will review its investment strategy to maximize yield. With the district earning more than 6 percent through the end of August 1993, a move to longer maturities was not necessary. As part of its process reengineering, DISD has hired an experienced fixed-income manager to move the district to longer and more varied securities.
D.58	Begin calculating and publishing the overall yield and investment yield on DISD investments.	Intact	Monthly investment holding and performance reports are being prepared.
D.59	Begin comparing district yields with other "top 10" school districts, the State Treasury, IBC Donoghue public money-market funds and the ten highest-performing money-market funds.	Intact	Appropriate comparisons will be included in future monthly investment reports.
D.60	<p data-bbox="327 1008 1066 1067">Develop a written procedures manual for the following cash flow management processes:</p> <ul style="list-style-type: none"> <li data-bbox="373 1110 961 1137">- Determination of cash available for investment <li data-bbox="373 1179 758 1206">- Development of cash position <li data-bbox="373 1248 646 1275">- Required use of cash <li data-bbox="373 1316 1066 1375">- Selection of a security and determination of market opportunities meeting safety and liquidity criteria <li data-bbox="373 1417 1041 1444">- Preparation of performance and management reports 	Intact	A set of written procedures will be developed and backup staff trained for cash-flow management processes.

Rec #	Recommendations	Implementation Status	Comments
D.61	<p data-bbox="327 188 1066 252">Prepare a monthly comprehensive investment report for the board that includes:</p> <ul style="list-style-type: none"> <li data-bbox="373 300 1066 363">- Investments allocated by fund for the current and preceding reporting periods <li data-bbox="373 403 1066 467">- Cash by fund available for investment for the current and preceding periods <li data-bbox="373 507 1066 571">- Percent invested by fund for the current and preceding periods <li data-bbox="373 611 1066 675">- The weighted average rate of return on investments maturing and purchased in the current reporting period <li data-bbox="373 715 1066 778">- T-Bill and federal discount rates as of the last day of the period <li data-bbox="373 818 552 842">- Overall yield <li data-bbox="373 882 594 906">- Investment yield <li data-bbox="373 954 1066 1018">- The amount of interest earned by fund for the current reporting period <li data-bbox="373 1058 1035 1082">- Any collateral exceptions occurring during the month <li data-bbox="373 1129 1066 1153">- Money retained in low- or non-interest bearing accounts <li data-bbox="373 1201 709 1225">- Cash forecasting accuracy 	Intact	Monthly comprehensive investment reports will be prepared for the board.

Rec #	Recommendations	Implementation Status	Comments
D.62	<p>Purchase a personal computer package to automate the district's cash management process. Available software should support:</p> <ul style="list-style-type: none"> - Investment portfolio management and monitoring - Collateral tracking - Interest apportionment - Cash-flow forecasting - Debt portfolio management - General ledger interface - Cash management - Daily cash worksheets - Bank balance reporting - Banking relationship management - Account analysis - Electronic funds transfer - Lotus spreadsheet interface - User-defined reporting 	Intact	This recommendation will be implemented. Hardware and software required to automate this process are in place.
D.63	Increase the bond coverage for district Treasury management staff to a more appropriate level (e.g. \$7.5 million).	Modified	All members of DISD's Treasury staff are bonded for \$2 million.
D.64	Establish a DISD Cash Management Committee to monitor the district's investment activities.	Modified	This function will be carried out by the Office of Budget/Finance and Planning on a bi-monthly schedule.

Rec #	Recommendations	Implementation Status	Comments
D.65	Authorize the district treasurer to cross divisional lines in executing efficient and effective cash-management practices.	Intact	This problem has been corrected by placing all necessary functions in Budget/Finance and Planning under the direction of one person. As part of the district's reengineering process, the treasurer now reports to the controller.
D.66	Institute an annual comparative review of investment policies, revising them as necessary.	Intact	This recommendation will be incorporated in the study of investment strategies performed at the start of each fiscal year; specific investment guidelines are being prepared for the district treasury's use.
D.67	Investigate the feasibility of using the Texas investment pool managed by the State Treasury (TexPool).	Intact	TexPool will be considered along with other investment options, but TexPool is not currently offering a yield as high as the district obtains locally. If this changes, the district is open to using it.
D.68	Establish procedures for centrally banking, investing, and accounting for school activity funds. Decisions concerning the use of funds should remain with the schools.	Not Implemented	School activity funds are the responsibility of local campuses. DISD feels that central fund control reduces campus access and creates a logistical challenge and additional administrative costs.
D.69	Phase schools into the centralized accounting system by adding all elementary schools in 1993 and all middle and high schools in 1994.	Not Implemented	DISD feels this recommendation is not cost-effective. Centralized accounting of activity funds would create hardships on school staff as well as central staff.
D.70	Significantly reduce the amount of internal audit staff time dedicated to school activity funds after the new system is in effect.	Not Implemented	DISD feels the reduction in internal auditing staff time would not outweigh the extra burden on campus staffs to generate daily transactions.

Rec #	Recommendations	Implementation Status	Comments
D.71	Develop and implement policies and procedures that: <ul style="list-style-type: none"> - prevent purchase orders from being processed near the end of a grant without special permission. - prevent grant administrators from accepting delivery of goods after a grant has terminated. - flag invoices for grants near termination for priority payment. 	Intact	Policies and procedures already are in place. Grant managers will be encouraged to expend funds according to more reasonable guidelines.
D.72	Conduct a detailed work-management system study of the Accounts Payable processes and install a formal work-management system.	Intact	DISD will conduct this study and install a formal work-management system. Process reengineering work has been completed by Arthur Andersen & Co., and new procedures are being implemented. Processes have been revised to increase efficiencies and obtain discounts where available.
D.73	After a formal work-management system has been implemented: <ul style="list-style-type: none"> - establish a formal training program for staff. - develop a personnel evaluation system based on the productivity of each employee. - hold staff accountable for achieving expected productivity. 	Intact	A work-management system will be designed to include staff training in word processing, increased productivity standards and the development of a written procedures manual. Training of all Accounts Payable employees has been implemented and will be ongoing as the district continues to refine the new processes.
D.74	Develop a written procedures manual for the Accounts Payable Department.	Intact	A new procedures manual should be developed by November 1993.

Rec #	Recommendations	Implementation Status	Comments
D.75	<p>Develop a weekly reporting system that monitors the backlog of pending invoices and reports:</p> <ul style="list-style-type: none"> - the number and dollar amount of prompt payment discounts received. - the number and dollar amount of prompt payment discounts not received. 	Intact	<p>This report is being generated. Due to system constraints, the report is being created manually. System modifications and other technology are being developed to improve the tracking and reporting of this information.</p>
D.76	<p>Working with the Purchasing Department, initiate an aggressive program to obtain prompt payment discounts on as many purchases as possible.</p>	Intact	<p>Done. DISD will continue to work with Purchasing to obtain discounts.</p>
D.77	<p>Conduct a detailed work-management study of the payroll processes and install a formal work-management system.</p>	Intact	<p>Process reengineering work has been completed by Arthur Andersen & Co. A new system is being implemented. Processes have been revised to increase efficiencies.</p>
D.78	<p>After a formal work-management system has been implemented, establish a formal staff training program, develop a personnel evaluation system based on employee productivity and hold staff accountable for achieving expected productivity.</p>	Intact	<p>Training of all Payroll employees has begun and will continue as the district refines its new processes. Personnel evaluations and accountability will be tied to training.</p>
D.79	<p>Develop a written procedures manual for the payroll process.</p>	Intact	<p>A written procedures manual will be developed.</p>
D.80	<p>Upgrade one clerk position to assistant supervisor status, to absorb some of the administrative review and training duties currently preventing the supervisor from developing long-range plans for the department and providing effective day-to-day management.</p>	Modified	<p>One clerk position was upgraded to a Senior Clerk to assist with some items previously done by the supervisor. In addition, a professional position was added in the department to further free the supervisor.</p>
D.81	<p>Conduct a detailed review of the Payroll Office's automation needs and replace the current system with a more efficient one.</p>	Intact	<p>The review of the payroll system is a major component of the district's technology review now in progress. The district also will continue to investigate further modifications to the existing system.</p>

Rec #	Recommendations	Implementation Status	Comments
D.82	Conduct a complete update of the district's equipment inventory files.	Intact	A system to maintain an updated equipment inventory is being reviewed as a part of a technology project. A physical inventory was conducted at the schools and the data are now being collected for reconciliation.
D.83	Annually conduct an internal audit of the district's equipment inventory.	Intact	This recommendation has become a function of the newly created Audit Department; the department also will conduct follow-up studies on lost equipment.
D.84	Establish a formal set of procedures and audit trail for adding or deleting equipment from the district's inventory files.	Intact	Such procedures now are being used and recommendations for improvement are being reviewed and evaluated.

Risk Management

109

D.85	Establish a policy, beginning with the 1993 calendar year, of contributing an equal amount to each employee's health-care plan, regardless of what plan they choose. Set the district's contribution at approximately \$91 per month (the average of the district's current contribution to Health Care Trust and HMOs) to bring the district's benefit contributions into line with contributions of other Texas school districts.	Modified	Under a plan approved June 28, 1992, employer contributions were equalized for participants in the district's health-care program. Under the health-care plan effective January 1, 1993, employer contributions were equalized at \$110 per participant.
D.86	Establish a more restrictive preferred provider network to service members of Health Care Trust.	Modified	The district has dissolved its Health Care Trust and entered into a contract for fully insured plan with an underwriter/carrier, effective January 1993. This recommendation has been implemented.
D.87	Institute a monthly reporting system to keep the board and management aware of the operations and finances of the Health Care Trust.	Modified	See above.
D.88	Develop an information system that maintains accurate records concerning employees and dependents who are members of each of the district's health plans. These records should be reconciled monthly with the records of each health plan manager.	Intact	See above. The district will seek proposals for benefit information systems to implement a new reporting and reconciliation system for all employee benefits effective in 1994.

Rec #	Recommendations	Implementation Status	Comments
D.89	Contract separately for mental health-care services and a "silent PPO"—a hospital network agreed to discount charges to the district.	Intact	See above.
D.90	Adopt managed-care practices in the operations of the Health Care Trust.	Modified	See above.
D.91	Transfer all trust and unemployment compensation activities and staff to the DISD Risk Management Department. Annual benefit enrollment should remain in Personnel Accounting.	Intact	Unemployment compensation activities were transferred to the Risk Management Department. Benefit enrollment will remain in Personnel Accounting.
D.92	Provide adequate training for unemployment compensation staff.	Intact	The district will collaborate with TASB in training personnel. A district specialist responsible for unemployment compensation attended a Spring 1992 workshop on unemployment compensation loss control offered by TASB.
D.93	Conduct a cost-benefit analysis to determine if its liability coverages and deductibles on all insurance policies are appropriate.	Intact	A study of all liability and insurance exposures will be completed by August 1994.
D.94	Have the Risk Management Department notify Maintenance of property damage.	Intact	Timely reporting of property damage is being accomplished.
D.95	Use savings from the above recommendations to expand the number of employees receiving health-care coverage.	Intact	Again, DISD has dissolved its Health Care Trust and entered into a contract for a fully insured plan with an underwriter/carrier. The district implemented a new physician services and hospital reimbursement plan for lower-level employees effective February 1, 1993.

Rec #	Recommendations	Implementation Status	Comments
Purchasing			
D.96	<p data-bbox="331 240 1073 331">Use a work-management system approach to streamline the entire requisition, purchasing, receiving and payment process. This effort should include:</p> <ul data-bbox="380 379 1073 783" style="list-style-type: none"> <li data-bbox="380 379 989 403">- eliminating unnecessary work tasks and approvals. <li data-bbox="380 451 894 475">- initiating a feedback status report to users. <li data-bbox="380 523 995 547">- establishing a tracking system for purchase orders. <li data-bbox="380 595 1073 651">- monitoring and scheduling purchasing workloads to more evenly match workload with staff availability. <li data-bbox="380 699 1052 722">- establishing workload expectations for purchasing staff. <li data-bbox="380 770 747 794">- monitoring staff productivity. 	Intact	<p data-bbox="1373 240 1976 440">An RFP has been developed for the preparation of such a plan. Included in the request are requirements to reengineer these business processes. The firm selected has made contact with the district's Purchasing Department and scheduled follow-up meetings.</p>
D.97	<p data-bbox="331 831 1073 959">Either move the Purchasing Department to a more suitable office setting or remodel the current office space to give buyers more privacy and provide more storage room for reference materials.</p>	Intact	<p data-bbox="1373 831 1976 919">A new site has been obtained. Purchasing was relocated during the 1992-93 school year. The new location offers the features mentioned by TSPR.</p>
D.98	<p data-bbox="331 1007 1073 1062">Develop and implement a plan to automate the requisition, purchasing, receiving and payment processes.</p>	Intact	<p data-bbox="1373 1007 1976 1270">This recommendation will be implemented as additional funds become available to purchase hardware and software. Initial steps have been made to automate the Purchasing Department, such as the acquisition of PC work stations and a file server and the installation of a network. Continued implementation will be contingent upon the availability of funds.</p>

Rec #	Recommendations	Implementation Status	Comments
D.99	Establish and enforce a board policy that no bid specifications will name specific brand items without the statement "or items of equal quality".	Intact	The language on the back of the bid form quotation sheets and district specification sheets all state that any reference to any brand name is descriptive and not restrictive, intended only to indicate the type and quality desired. Purchasing has increased its efforts to include all bid specifications on district forms, which feature this statement in their opening paragraph.
D.100	Develop and enforce a schedule for purchasing similar items so that purchase orders can be pooled to obtain volume discounts.	Intact	A calendar to procure similar items will be implemented during the 1993-94 school year. Purchasing always combines requisitions that reach the office within a reasonable time, as is required by law. However, Purchasing does not wish to retard the educational process by delaying necessary purchases.
D.101	Actively seek discounts for prompt payment of invoices in bid specifications and contract negotiations.	Intact	This recommendation will be implemented. Item 9 on the district's notice to bidders states that the district uses payment discounts in determining the lowest, best bid.
D.102	Require executives to assist the Purchasing Department in enforcing purchasing deadlines and procedures.	Intact	This is being done on an ongoing basis.

112

Management Information Systems (MIS)

D.103	Develop a comprehensive strategic plan for information systems. This plan should consider hardware and software platform alternatives using a strong database, open systems and network architecture.	Intact	The comprehensive strategic plan for technology has been completed to include management information systems.
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Rec #	Recommendations	Implementation Status	Comments
D.104	<p>Implement a chargeback program in which user departments receive budgets for and must pay for MIS services. Having users pay for MIS services will improve the usage of centralized MIS services and provide a measure of cost control. Also, a chargeback system would provide a means to account for MIS costs associated with the development and general use of computer systems. Charges would be billed to DISD departments that benefit from its use, thus making user groups accountable for the services received.</p>	Intact	<p>Computer services now are charged back through regular budget allocations.</p>
D.105	<p>Abolish the current technology committee and replace it with a steering committee composed of senior management, MIS Division management and user representatives. This mixture would represent an important step towards building a team relationship between MIS and its users. This committee should provide valuable feedback on information systems design and operations and help establish consistent priorities.</p>	Intact	<p>A technology steering committee will be established, including representatives of all facets of computer technology.</p>

- The steering committee should immediately review its extensive backlog of user requests to determine which items are no longer needed or which are of sufficiently low priority or impact to be eliminated. Requestors should be asked to recertify that the items still are necessary and include a cost-benefit justification. Recertified items should then be presented to the steering committee for review and prioritization. MIS management should prepare an implementation plan and timeline for addressing its remaining backlog.
- All programming requests requiring extensive resources should be reviewed by the steering committee. Additionally, procurements should be reviewed to ensure that the plan is being followed. However, normal MIS supplies should *not* be funneled through this group.

Rec #	Recommendations	Implementation Status	Comments
D.106	<p data-bbox="331 196 1073 292">Develop an internal and external reporting system that illustrates how users are being served and resources used. The system should include the following reports:</p> <ul style="list-style-type: none"> <li data-bbox="380 336 932 501">- Cost control reports (monthly) <ul style="list-style-type: none"> <li data-bbox="428 371 695 395">• budget versus actual <li data-bbox="428 405 590 429">• cost trends <li data-bbox="428 438 932 462">• capital expenditure budget versus actual <li data-bbox="428 472 732 496">• cost allocation to users <li data-bbox="380 547 989 711">- Operations resource utilization reports (monthly) <ul style="list-style-type: none"> <li data-bbox="428 582 877 606">• CPU capacity, available versus used <li data-bbox="428 616 911 639">• storage capacity, available versus used <li data-bbox="428 649 873 673">• overtime hours worked by function <li data-bbox="428 683 936 707">• warnings of potential capacity problems <li data-bbox="380 753 1068 917">- Software resource utilization reports (monthly) <ul style="list-style-type: none"> <li data-bbox="428 788 905 812">• backlog of work requests in staff hours <li data-bbox="428 821 1068 880">• percentage of staff devoted to maintenance, modifications and new systems <li data-bbox="428 890 732 914">• average age of requests <li data-bbox="380 963 1068 1193">- Operations performance control reports (monthly) <ul style="list-style-type: none"> <li data-bbox="428 999 699 1023">• number of incidents <li data-bbox="428 1032 810 1056">• cost of recovery for all reruns <li data-bbox="428 1066 1068 1125">• average and median terminal response time measured at the terminal <li data-bbox="428 1134 762 1158">• reports delivered on time <li data-bbox="428 1168 884 1192">• system down-time versus a standard <li data-bbox="380 1240 1068 1374">- Software performance control reports (monthly) <ul style="list-style-type: none"> <li data-bbox="428 1275 1068 1334">• status on major projects indicating accomplishments versus schedule, cost versus budget <li data-bbox="428 1343 957 1367">• percentage of projects completed on time <li data-bbox="380 1414 1041 1474">- User relations performance control reports (annually) <ul style="list-style-type: none"> <li data-bbox="428 1449 758 1473">• survey of user satisfaction 	Intact	Systems utilization and communication status reports currently are available. Hotline reports showing problem identification and resolution time frames will be developed.

Rec #	Recommendations	Implementation Status	Comments
D.107	<p>Combine all existing hotline reports to establish a formal problem-management program, including:</p> <ul style="list-style-type: none"> - Thorough documentation of standards and procedures as well as hardware and software - A hotline or help desk to receive problem reports - Thorough problem logging and tracking techniques - Problem-resolution priorities based on need rather than available resources - A problem coordinator with the authority and ability to initiate and supervise problem-solving efforts - DISD communications and management practices that set an ongoing pattern of problem prevention, solution and follow-up 	Intact	Four help-desk stations are now active. A database of problems and solutions is planned, so that some common problems can be handled more quickly.
D.108	Transfer non-MIS operations to another division and restructure the division along functional and customer-service lines to focus MIS services on the district's business and instructional needs.	Intact	DISD's Technology 2000 plan includes a reorganization to coordinate district resources, improve efficiency and help accomplish this recommendation.
D.109	Develop a disaster recovery plan that addresses the possibility that an unforeseen event will render the computer operations inoperable.	Intact	The Technology 2000 plan includes a disaster recovery plan.
D.110	Implement a well-coordinated capacity management program to address hardware efficiency, effectiveness, productivity, reliability and availability.	Intact	DISD has retained a consultant to determine capacity management and hardware needs addressed in this recommendation. Technology 2000 provides for phasing out the mainframe.
D.111	Purchase additional disk drives to provide the space required to handle growth and maximize mainframe resources.	Modified	The Technology 2000 plan will phase out the mainframe.
D.112	Expedite communications equipment purchases to allow additional users to be added to the mainframe.	Modified	See above.

Rec #	Recommendations	Implementation Status	Comments
D.113	Plan, forecast and calculate the network support needed to properly serve the business and academic users within DISD.	Modified	See above.
D.114	<p data-bbox="327 300 695 323">Add a new network manager to:</p> <ul style="list-style-type: none"> <li data-bbox="375 368 1066 499">- develop written processes and procedures for network management. This should include a sequence of application steps including guidelines for the use of tools needed to execute network management functions. <li data-bbox="375 544 1066 603">- add two additional skilled staff members to support the district's growing needs for computer networks. <li data-bbox="375 647 1066 810">- centralize staff and responsibilities for network management. This will allow integration across multiple communication forms, vendors, network architectures, processors, applications, databases and network management products. 	Modified	See above.
D.115	<p data-bbox="327 855 856 879">Set up a centralized user training program to:</p> <ul style="list-style-type: none"> <li data-bbox="375 892 1066 951">- enhance users' skills in using computer productivity tools. <li data-bbox="375 995 1066 1054">- identify education and training vehicles currently available in the market. <li data-bbox="375 1099 1066 1158">- select appropriate vehicles, using either internal or external resources, for standard MIS educational offerings. <li data-bbox="375 1203 1066 1334">- develop curricula using various training methods to appeal to different users' needs, including seminars, hands-on instruction, computer-based training, self-paced manuals and video instruction. 	Intact	This recommendation is one of the highest priorities in the district's technology plan and continues to be implemented.
D.116	Use outside consulting assistance to meet peak software development demands and address special problems without adding permanent staff.	Intact	This recommendation will be implemented. Consultants are being used as needed.

Rec #	Recommendations	Implementation Status	Comments
D.117	Buy software packages, when available, instead of building them.	Intact	This recommendation continues to be implemented.
D.118	Conduct a feasibility study to determine whether outsourcing district payroll processing would be advantageous.	Intact	This study is being conducted.
D.119	Contract with an outside programming support entity to adapt the current purchasing system to on-line data entry.	Intact	The implementation of this recommendation will occur with the development of the new system resulting from the district's work-management study.
D.120	Select and purchase appropriate structured techniques, systems design methodologies, project management software, prototypes and fourth-generation languages to improve MIS productivity. Adopt a top-down systems planning, analysis and design methodology.	Intact	The Technology 2000 plan provides for the implementation of this recommendation.
D.121	Begin emphasizing the MIS support role rather than the current control role in the development of software applications. Instead of being a focal point in applications development, MIS could encourage users to assume responsibility for their own information processing. By transferring many systems development and processing functions to the user, MIS will avoid misinterpreting requirements, limiting the user's flexibility and lengthening turn-around time.	Intact	The Technology 2000 plan provides for this new environment.
D.122	Enhance DISD's training program for analysts and designers.	Intact	This recommendation continues to be implemented.
D.123	<p data-bbox="323 1142 1066 1206">Institute effective project-management practices and reporting, including:</p> <ul data-bbox="369 1241 646 1409" style="list-style-type: none"> <li data-bbox="369 1241 646 1270">- Staff time accounting <li data-bbox="369 1313 617 1342">- Project scheduling <li data-bbox="369 1385 583 1414">- Project tracking 	Intact	This recommendation has been implemented with a customized software project-management system.

Rec #	Recommendations	Implementation Status	Comments
D.124	Hire a specialist or contract with an outside consultant to identify the most efficient way to structure the district's telecommunications system and eliminate live telephone operators.	Intact	This study has been completed and analysis and program planning are in progress. As plans for a wide-area network are implemented, the district's need for phone lines may be reduced.
D.125	Transfer responsibility for all telephone and telecommunications functions from the Transportation to the MIS Division.	Intact	Done.
D.126	Establish a telecommunications plan within the MIS strategic plan.	Intact	The telecommunication plan within the MIS strategic plan is being addressed in the MIS study.

Internal and External Auditing

D.127	<p>Improve public confidence in the district's ability to manage its business operations by:</p> <ul style="list-style-type: none"> - revising policies and procedures to specifically address business practices and the use of DISD resources. - Improving management practices through improved work-management systems. - taking disciplinary action against staff administrators and board members who violate board policies and procedures. - significantly increasing the number and scope of internal audits to cover all major DISD business and management operations. 	Intact	The superintendent's request for this audit was intended to demonstrate concern about and initiate action to improve public confidence in this district's ability to manage its business operations. The recommendations of this audit are being systematically considered, studied and incorporated into DISD's management system and business operations.
D.128	Increase DISD's internal audit staff to eight, until such time as the superintendent and board are satisfied that the district's business and management operations are being effectively managed.	Intact	Five additional internal auditors have been added to four existing positions to conduct management improvement studies of DISD's operations.
D.129	Change reporting relationships so that the internal audit staff reports directly to the superintendent rather than the executive manager of Budget and Financial Management.	Intact	The Internal Audit Department now reports directly to the superintendent.

Rec #	Recommendations	Implementation Status	Comments
D.130	<p data-bbox="331 172 1066 268">Expand the scope of internal audits to include all DISD operations using district resources. In particular, the following additional areas should be periodically audited:</p> <ul style="list-style-type: none"> <li data-bbox="373 312 674 336">- Equipment inventories <li data-bbox="373 381 842 405">- Purchasing and contracting practices <li data-bbox="373 450 915 474">- Adherence to terms of contracts and grants <li data-bbox="373 518 667 542">- Warehouse operations <li data-bbox="373 587 709 611">- Supply inventory controls <li data-bbox="373 655 688 679">- Maintenance operations <li data-bbox="373 724 621 748">- Use of DISD assets <li data-bbox="373 793 646 817">- Custodial operations <li data-bbox="373 861 684 885">- Food-service operations <li data-bbox="373 930 627 954">- Athletic operations <li data-bbox="373 999 632 1023">- Personnel practices <li data-bbox="373 1067 743 1091">- Utility bills and consumption <li data-bbox="373 1136 590 1160">- Data processing 	Intact	This recommendation has been completed. A three-year audit plan was submitted to the Board of Education in November 1992.
D.131	Develop annual internal audit plans for board approval. These plans should be developed in conjunction with the district's external auditors.	Intact	An annual audit plan was developed and presented to the Board of Education. The plan is being updated and revised in conjunction with Arthur Andersen, the District's external auditor.
D.132	Include sufficient staff time in the annual audit plan for unscheduled, unannounced audits of areas of concern that arise during the year.	Intact	The audit plan includes this recommendation.

Rec #	Recommendations	Implementation Status	Comments
Personnel Policies and Procedures			
D.133	<p>Reduce the number of positions reporting to the Personnel Office Division manager by establishing an office manager under the division head, to supervise the following staff positions:</p> <ul style="list-style-type: none"> - CBX operators - Receptionists - Word processors - Custodian - Building engineer 	Intact	Done.
120	D.134 Place all personnel functions on line within each office and among schools and departments.	Intact	This project is 75-percent complete; development of a new imaging system to complete the process is under way.
D.135	Reduce the number of clerical duties presently performed by professional staff.	Intact	Professional staff members now perform very few clerical duties.
D.136	Update all personnel policy and administrative regulations to reflect the new organizational structure and School-Centered Education program.	Intact	Policies and administrative regulations are being updated. The major policy sections already have been updated. Continuous review is in progress.
Personnel Records			
D.137	Develop a schedule for purging files on an annual basis.	Intact	This recommendation will be implemented on an ongoing basis. This project is 25-percent complete.
D.138	Remove all documentation not required by law from employee files; individuals should be notified that files will be purged and given a reasonable amount of time to pick up documents before they are destroyed.	Intact	This recommendation is on schedule.

Rec #	Recommendations	Implementation Status	Comments
Personnel Hiring and Affirmative Action			
D.139	Expand the use of the district's affirmative action plan as a guide for the recruitment, retention and promotion of teachers and administrators.	Intact	This recommendation continues to be implemented.
D.140	Develop written operating procedures for processes and functions related to recruitment and hiring.	Intact	Operating procedures for processes and functions related to recruiting and hiring were refined. Written operating procedures are being developed to refine the reorganization process.
D.141	Formally articulate the criteria and selection and assignment processes for hiring principals and assistant principals.	Intact	Greater emphasis will be placed upon articulating the criteria, selection and assignment process for the hiring of principals and assistant principals. This process has been articulated through staff meetings and postings sent to schools on January 27, 1993.
D.142	Develop a board policy and administrative procedures, as required by Section 13.352 TEC, to increase principals' input and decision-making authority in hiring personnel.	Intact	This policy was developed and has been in effect since November 1992.
D.143	Develop and implement a fair and objective system for the redemption or removal, rather than the transfer, of incompetent or unqualified teachers and administrators.	Intact	A program for teacher redemption has been implemented through Training and Development Services. Supervision and training of administrators is the responsibility of area directors.
D.144	Eliminate the administrative reassignment pool and hold principals and other administrators responsible for the evaluation, documentation, retraining and dismissal of unproductive employees.	Intact	This recommendation has been implemented. The Employee Relations staff has met with principals to provide training on evaluation, documentation, retraining and possible dismissal of employees who do not perform at a satisfactory level.

Rec #	Recommendations	Implementation Status	Comments
D.145	Increase principals' involvement in the selection and assignment of custodians from the district custodial pool.	Intact	Due to budget cuts, the pool concept ceased to be useful at the beginning of the 1990-91 school year. Principals now are more actively involved in custodial selection. The department recognizes the need to continue to streamline this process and recommendations are now being reviewed. This recommendation will be fully implemented in DISD's newly reorganized personnel functions.
D.146	Assist and support the Region 10 education service center in developing and implementing a regional personnel recruitment effort.	Intact	The department currently is participating with Region 10 as a partner in the regional recruiting program.
D.147	Establish Future Teachers of America Clubs in DISD's middle and high schools.	Intact	Due to organizational and structural obstacles encountered by the Training Division, responsibility for the implementation of this recommendation has been assumed by the Personnel Services Division and the Area Directors.

122

Staff Development

D.148	Relocate the Staff Development Division director to the Nolan Estes Center to make the position more accessible to district staff.	Intact	The division director was moved to the Nolan Estes Center's Academy for Staff Development for school year 1992-93. However, the director is being moved back; the district decided against the relocation.
D.149	Annually conduct a systematic analysis of TTAS results by school and domain to target teachers' training needs.	Intact	This recommendation continues to be implemented with existing staff.
D.150	Reassess the board policy on mandated reading comprehension training that has consumed the major part of available in-service time for three years.	Intact	Campus-level flexibility is available to accomplish the mandated training in reading. Schools develop their campus plans to include needs based on achievement data.

Rec #	Recommendations	Implementation Status	Comments
D.151	Implement DISD's planned "train-the-trainer" model. Require all district trainers to demonstrate competence in a simulated training session prior to actual training delivery.	Intact	The model is already in place, including the requirement that trainers demonstrate effective delivery. A "train-the-trainer" model will be instituted in December training for Staff Development associates. Program components include Five Models of Staff Development, the Adult Learner, Effective Training Techniques for the Transfer of Learning and Effective Presentation Skills.
D.152	Require that all training emphasize practical applications, including follow-up application in the work place.	Intact	See above.
D.153	Evaluate the cost-effectiveness of all staff-development services offered by the Region 10 education service center in relation to current DISD staff development services and future needs.	Intact	Teachers: Block Grant Cooperative was not funded for the 1992-93 school year. Administrators: Voluntary participation in the Management/Leadership Training Cooperative costs \$100; administrators may choose to attend all of about 25 sessions.

123

Performance Assessment

D.154	Tighten criteria and appraisal training for the TTAS.	Intact	DISD will develop a proposal for a waiver to relieve the rigidity of the system in certain procedural aspects and seek legislation to allow local boards more control to broaden the scope of the evaluation. TTAS domains, criteria and indicators are determined by state rule. Training is delivered through the regional educational service center, as per state rule.
D.155	Provide accurate teacher evaluations and provide the district support needed to retrain or dismiss a teacher for good cause.	Intact	The district will continue to train principals in evaluation procedures and increase training for teachers with identified weaknesses. This recommendation continues to be implemented.

Rec #	Recommendations	Implementation Status	Comments
D.156	Direct the Division of Training and Development Services to work with the Software Development Office to develop on-line data forms for all appraisal instruments.	Intact	On-line data forms will be developed for appraisal instruments not already computerized. Additional hardware must be purchased for many elementary schools that do not have this capability. This recommendation is scheduled for implementation in 1995.
D.157	Train all appraisers in the use of the on-line appraisal data system.	Intact	This recommendation is supported by DISD. However, some campuses lack sufficient hardware to accomplish this recommendation. Efforts are being made through the technology plan to expand this capability. Training includes practical applications of the on-line appraisal data system.
D.158	Consider broadening the appraisal rating scale for both administrative and support personnel.	Intact	Ambiguity exists in this area, as the Board of Education is considering moving administrators to a one-year contract. The Administrative Appraisal Committee recommended that only two categories (meets expectations/below expectations) be used until a merit-pay opportunity becomes available. Should this opportunity arise, the committee recommended that an additional category such as "meritorious" be added, with an additional set of criteria and indicators that exemplify service above and beyond the present levels.
D.159	Analyze all appraisals and tie results to performance pay, staff development and employment decisions.	Intact	The district has procedures in place for performance pay and employment decisions based on the analysis of appraisals. Appraisals also are used to target teachers for additional training. DISD will explore future steps when effective indices are developed.

Rec #	Recommendations	Implementation Status	Comments	
Labor and Employee Relations				
D.160	Assign temporary data-entry assistance to the position control specialist so that the specialist has sufficient time to train staff and bring all campuses and departments on-line with the position control system.	Intact	Done.	
D.161	Eliminate paperwork that causes delays in personnel decisions as soon as a department or campus has the on-line position control system.	Intact	Training for campus principals and CRCs has been increased to include the use of the on-line position control system.	
D.162	Develop and train principals and personnel staff in a system of "targeted selection" to more objectively select new personnel and transfers.	Intact	Principals and personnel staff will be trained in the personnel selection and transfer processes. This training is continuous. With the reorganization of the Personnel Services Division, a revised training program will be initiated.	
125	D.163	Make principals responsible for maintaining the "Singleton Ratio" in the makeup of faculty.	Intact	Compliance to the Singleton Ratio will continue to be monitored on a campus-by-campus basis.
D.164	Establish priorities for implementing recommendations of the DISD-commissioned compensation study and begin implementing them according to priority. We recommend that principal's pay be given high priority, given increased responsibilities under SCE and inequities that already exist in pay levels.	Intact	This recommendation is being implemented.	
D.165	Review the number of days per year worked by all central office employees to establish a more consistent pattern.	Intact	The number of contract days is determined by the requirements of the job. Review of job requirements is an ongoing process.	
D.166	Schedule maintenance and other supervisors for the same number of days as the workers they supervise.	Intact	Adjustments will be made over the next few years to comply with contractual requirements. In the current school year, sufficient funds were not available to cover this proposal's incremental costs. Funds will be proposed in 1993-94.	

Rec #	Recommendations	Implementation Status	Comments
Program Evaluation			
D.167	Require the DISD Division of Evaluation and Planning to review all grants before submission, to determine the appropriateness of including (when allowed) a line-item request for program evaluation. Further, evaluation funds from existing programs should be assigned to the Division of Evaluation and Planning.	Intact	The Division of Program Evaluation Services reviews all grants for appropriateness and the inclusion of an evaluation component.
D.168	Require district and school managers to define program objectives in measurable terms.	Intact	All program managers are required to ensure that program proposals include an evaluation design approved by the Division of Program Evaluation Services.
D.169	Require a formal evaluation of each program or discipline in which students fail to make substantial progress toward the attainment of program objectives for two consecutive years.	Modified	Evaluations occur routinely for all programs. Disciplines are evaluated through curriculum reviews, instructional planning and appraisal processes. Department resources preclude additional formal evaluation as called for in this recommendation.
D.170	Require program managers to formally respond, in writing, to all findings relative to their programs, including recommendations from TEA and others.	Intact	This recommendation will be implemented. Findings are reviewed on a schedule developed by the Program Evaluation Services Division. Program managers revise their plans to reflect the findings and recommendations.
D.171	Adopt and enforce a program-review plan to ensure that each program is evaluated on a regular basis. Ineffective programs should be identified and eliminated, resulting in a savings to DISD.	Intact	All programs are reviewed through our Education Council, Management Council and executive team.
Student Assessment			
D.172	Strengthen district efforts to improve test scores on TAAS, STEELS and NAPT.	Intact	This is one of the district's primary ongoing objectives. Specific corrective action plans have been developed by all schools in the bottom quartile on the TAAS and NAPT. Area coordinators have been specifically assigned to provide intensive supervision for these schools.

Rec #	Recommendations	Implementation Status	Comments
D.173	Continue to provide staff-development activities that will assist teachers in using test data to improve the quality of instruction. Such sessions should focus on the development of higher-order thinking and analytical skills such as analysis, interpretation and extrapolation.	Intact	This recommendation will be implemented. The Program Evaluation Services Division has conducted workshops for principals and teachers to increase their ability to use test data to improve the quality of instruction.
D.174	Review the usefulness and quality of each assessment tool in use and determine if some tests could be eliminated, combined or replaced. Further, if the Division of Evaluation and Planning determines that certain tests are not achieving their desired purpose, DISD should look for alternative instruments.	Intact	The testing program for 1992-93 was revised to reflect the review, revisions and adjustments made to ensure effectiveness and efficiency.
D.175	Discontinue the practice of paying some test coordinators (usually non-counselors) a small stipend, unless funds become available to pay all test coordinators.	Intact	No test coordinators are paid now.
D.176	Give all teachers and principals a detailed annual testing plan and schedule at the beginning of each year.	Intact	This recommendation continues to be implemented.
D.177	Ensure that DISD's "pay-for-performance" system does not penalize schools and teachers whose students begin at relatively low levels but make progress.	Intact	The "pay-for-performance" system has been specifically designed to accomplish this recommendation. The district's accountability system continues to consider measurements of schools against their individual normative data to ensure that no school or teacher is penalized.
D.178	Develop foreign-language versions of the STEELS test for foreign-language classes, or identify an alternative assessment instrument. This change could be implemented over a two-year period to coincide with scheduled revisions to STEELS.	Intact	The Assessment of Course Performance (ACP) has replaced the STEELS test for foreign-language classes.
D.179	Continue to review DISD testing policies and make necessary adjustments to ensure that tests are administered in a professional manner and that students, parents and teachers are aware of testing security and procedures.	Intact	This recommendation is being implemented.

Rec #	Recommendations	Implementation Status	Comments
Student Records			
D.180	Maintain students' cumulative record files in a secure and restricted area that is inaccessible to unauthorized persons.	Intact	Students' cumulative record files are maintained in school vaults or other secure areas. This recommendation is the standard expectation for all those who maintain student record files.
D.181	Develop a written set of policies and procedures for the maintenance of student records. This recommendation represents a potential reduction in liability if the district were to be sued under the Federal Privacy Act.	Intact	Policies have been put in place to ensure the security of student records.
D.182	Keep cumulative files in metal filing cabinets to protect records. Metal filing cabinets already within school facilities could be used. Schools without metal filing cabinets could acquire them from district warehousing or purchasing.	Intact	Done.
D.183	Relieve computerized records control (CRC) clerks of other responsibilities for the school during peak times in each grading period.	Intact	CRC clerks are relieved of other responsibilities during peak times in each grading period. Part-time CRCs will be hired during peak workload periods.
Student Services			
D.184	Implement the recommendation of the district's February 1991 compensation study concerning staff nurses to reduce high turnover rates.	Intact	The compensation recommendation for nurses was implemented in September 1992.
D.185	Develop improved programs for recruiting Hispanic counselors, nurses and psychologists.	Intact	For the past two years, DISD has increased emphasis on recruiting Hispanic counselors, nurses and psychologists. The affirmative-action plan will be expanded as a guide in this effort. A "Grow-Your-Own" project for recruiting Hispanic counselors is being researched with the Division of Personnel Services and the Department of Training and Development Services. Moreover, a committee is investigating the possibility of a stipend for bilingual counselors, nurses and psychologists.

Rec #	Recommendations	Implementation Status	Comments
D.186	Redefine the structure of the Office of Student Services so that it more closely aligns with and reflects the composition of Assistance and Consultation (ACT) teams at SCE schools.	Intact	A revised organization plan has been developed to align student services functions and staff configurations within the ACT teams. The DISD Department of Health and Human Services was created to integrate and coordinate all district health and mental-health-related departments.
D.187	DISD's Office of Student Services should not coordinate the administration of the PSAT/NMSQT to secondary students. Project Early Options should be transferred to the Division of Curriculum and Instruction.	Intact	Special Instructional Services is now housed in Curriculum and Instruction. Administration of PSAT/NMSQT is a student guidance function. Preparatory courses are available on campuses. Curriculum and Instruction Services attends to this activity. Project Early Options (in Special Instructional Services) is a specially funded program to encourage students to take the tests. The district has achieved a 258-percent increase in minority participation during the past four years.
D.188	Establish additional links with organizations who will sponsor and subsidize child day care (before and after school and on school holidays) for teen parents attending, or who wish to return to, DISD schools.	Intact	DISD has established formal links with Child Care Group of Dallas and Dallas County Head Start. Head Start is the official manager of federal funding for child care, and the Child Care Group is a designated provider as well as placement manager for child-care funds under the auspices of the Texas Department of Human Services' Child Care Management System. The availability of infant and child care for school-aged parents has increased as a result of the district's alliance with the Child Care Group and Head Start, as well as the YMCA, Parkland Hospital, and the City of Dallas, in conjunction with parenting and pregnancy services supported with a grant from the Texas Education Agency. Efforts to establish additional linkages for day-care services for infants of teen parents are under way with the area Child Care Consortium.

Rec #	Recommendations	Implementation Status	Comments
D.189	Become more proactive in securing federal and state grants for teen parents and their children, including grants for the development of additional child day-care centers.	Intact	<p>Since the recommendations in the comptroller report, well over \$1 million in direct and in-kind services has been garnered for school-aged pregnancy and parenting services. A grant totaling more than \$300,000 has been awarded to provide these services in conjunction with Parkland Hospital and the City of Dallas.</p> <p>A specific effort to develop school-aged parenting and child-care programs has been initiated for the Seagoville High School area. Child care and other support services will be provided at a fairly new hospital facility that had closed down. The district remains committed to seeking and maintaining additional funding streams for these services by actively seeking local, state and federal assistance, as well as through PEIMS and Medicaid reimbursement formulas.</p>
D.190	Develop an allocation formula for counselors and nurses including high-risk factors as variables in its methodology. Continue some degree of flexibility in allocating counselors by using indicators of high risk at each school and considering the school climate and surrounding community.	Intact	<p>The current allocation formula for nurses includes high-risk factors as a variable. Indicators of high risk at individual schools will be included as resources permit.</p> <p>Lump-sum budgeting and site-based management will allow high-risk factors to be included in counselor allocations as a variable.</p>
D.191	Redesign Project SOAR using Chapter II funds so that the program formally integrates crisis prevention as well as crisis management and intervention.	Intact	Project SOAR has been redesigned to integrate crisis-prevention initiatives. One such initiative is the district's safety and crisis-response plans that are developed yearly on each campus.

Rec #	Recommendations	Implementation Status	Comments
D.192	Clarify counselors' roles and responsibilities under school-centered education. A planned and comprehensive schedule of reduced expectations from the central office should be delivered to all counselors at the beginning of each school year. Non-guidance functions should be minimized.	Intact	Counselors' roles are determined at the campus level, based on the principal's perception of needs. Principals are reminded of their responsibility in this area by supervisors who hold them accountable. During 1992-93, counselors on school-centered education campuses were trained in TEA's Comprehensive Guidance Program Model, which proposes that counselors devote 80 percent of their time to direct services. The remaining counselors will be trained in 1993-94. Principals will be kept informed.
D.193	Encourage principals to use assistant principals and deans of instruction rather than counselors as their designees for administrative assignments.	Intact	Principals will be directed by their supervisors to use counselors in appropriate roles. A time-and-task analysis will be conducted with counselors during fall 1993. Results will be used to determine the extent of their non-guidance functions.
D.194	Develop a balanced, comprehensive guidance program that meets the needs of DISD students. Counselors should receive additional polycultural sensitivity training for multi-ethnic settings.	Intact	DISD's guidance program plan is aligned with the state-adopted plan. Multicultural training was provided for counselors during the 1992-93 school year.
D.195	Provide a psychologist for the school-community guidance center for those students with extreme behavioral, social, emotional or psychological problems that interfere with their (or others') education.	Intact	The School Community Center was allocated a school psychologist, visiting teacher and educational diagnostician.
D.196	Provide counselors with private spaces at all campuses for providing their services.	Intact	Privacy for counselors was recommended to principals by their supervisors. Within current available space, every effort is being made to provide such privacy.
D.197	Continue proactive efforts, through SCE and ACT teams, to establish schools as "brokerage centers" for students and families needing community health and social services. ACT teams should also actively broker child- and infant-care services for younger latchkey students and teen parents.	Intact	DISD's School-Centered Education plans include a "brokerage center" concept that provides an avenue by which families can better access crucial health and social services. The ACT's primary focus is school climate issues and the fostering of increased parental involvement.

Rec #	Recommendations	Implementation Status	Comments
D.198	As currently planned, hire additional counselors to meet state staffing guidelines.	Intact	Counselor staffing guidelines for the 1993-94 school year are as follows: In secondary schools, one counselor for 500 students; in elementary schools, two counselors for 900 or more students, one for 450 to 899 students and half of one for 449 students or less.

Code of Conduct

D.199	Develop procedures to maintain consistency in reporting disciplinary problems and actions.	Intact	DISD will develop procedures to maintain consistency in reporting disciplinary problems and actions. The district has conducted two mandatory attendance sessions on contact and communication with the Dallas County Juvenile Department, orientation on the Student Code of Conduct and implementation of Campus Level Discipline management. Staff were given specific instructions concerning due-process provisions in laws governing discipline, and on appropriate procedures and forms to use when documenting disciplinary actions. A symposium for administrators was held that addressed state-of-the-art practices in discipline management, with special emphasis on handicapped children and youth. Finally, the Student Advocacy Appeals and Hearings Office has been equipped with appropriate computer technology to chronicle all discipline reports as needs dictate.
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Rec #	Recommendations	Implementation Status	Comments
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Library Media and Audiovisual Services

D.200	Automate library purchasing procedures to prevent delays and take advantage of sales in a more timely manner.	Intact	This recommendation is being implemented as funds become available. As stipulated in the district's bid specifications, book vendors are providing acquisition software as part of their service. The programs are written in the DOS language and require PCs; modems are required to transmit the data. Training sessions in electronic ordering also are being offered. DISD's Board of Education has awarded a bid for a turnkey, fully integrated library automation system to Dynix Scholar. This system will include cataloging and acquisition modules. All schools will be on Dynix by the end of the 1994 school year.
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133

D.201	Use existing technical support staff from the central office to process books and make them "shelf-ready."	Intact	This recommendation will be accomplished with the assistance of local campus media center personnel. Vendors are being required to provide shelf-ready books. The district's bids further stipulate original cataloging for all books supplied by jobbers. When librarians must order direct, the books may not be cataloged. Most audiovisual resources are not cataloged.
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PCs, printers and CD-ROM drives have been ordered for seven work stations at Library Technical Services (Processing). The district has purchased approximately two million bibliographic records on compact discs, Alliance Plus from Follett and Precision One from Brodart.

Instructional Materials and Textbooks

D.202	Provide each school with a budget for textbooks and hold principals responsible for operating within this budget.	Intact	This recommendation is being implemented.
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Rec #	Recommendations	Implementation Status	Comments
D.203	Petition the state to eliminate its current punitive policy toward principals and teachers on textbook accountability and replace it with an incentive policy that would permit dollars saved in school textbook budgets to be used to supplement the salary of school textbook coordinators and for instructional purposes.	Intact	The state will be petitioned to eliminate the current policy on textbook accountability and replace it with an incentive policy.
D.204	Direct the district's internal auditors to ensure the accuracy of textbook counts at the campus and district levels.	Intact	Responsibility for textbook audit has been returned to Textbooks staff. A full-time textbook auditor position was created that reports to the textbook coordinator. This move was prompted by the need to coordinate audit results with ongoing textbook activities.
D.205	Require teachers to be financially responsible for their own books. Principals should routinely check for teachers' editions if teachers transfer or leave the school.	Intact	DISD has and will continue to hold teachers responsible for teachers' editions.
D.206	Develop and implement a plan for using scanners already owned by DISD to manage and control textbook inventories.	Intact	Textbook publishers were contacted about the possibility of bar coding all new textbooks. The publishers would not agree to bar code textbooks, as they believe that the code would detract from the aesthetics of their covers and hurt sales. The district will continue to work with publishers and TEA to resolve this issue.
D.207	Develop a procedures manual that describes district textbook policy and administration. The manual should be made available to schools by July 1992 and should include auditing procedures and sample forms. Audits of schools should be based on enforcement of these policies.	Intact	A procedures manual was completed in July 1992 and revised in July 1993.
D.208	Consider automating the textbook monitoring and requisition processes by linking the textbook database with the established enrollment database.	Intact	Done.

Rec #	Recommendations	Implementation Status	Comments
D.209	Petition the state to re-examine Education Code 12.64(a) to weigh the necessity for bonding textbook coordinators. Standard accounting procedures eliminate the need for this bond money and could save each Texas school district thousands of dollars in insurance premiums each year. Alternatively, the districts could find a way to self-insure themselves against this risk.	Intact	Education Code 12.64(a) was repealed by the Legislature.
D.210	Petition the State Board of Education to require publishers to stamp and number (or bar code) textbooks adopted by the state.	Intact	DISD petitioned the State Board of Education to require publishers to stamp and number all new textbook adoptions. TEA responded that this request would require legislative action, not a change in state board rules. (The state Legislature will be petitioned in this matter.)
General Education			
D.211	Petition the court to establish for DISD a set of specific performance goals which, when attained, should result in DISD being released from the desegregation order.	Intact	DISD is preparing a formal petition for the court.
D.212	Establish and implement a multi-year plan for achieving court-determined performance goals and attaining release from the desegregation order.	Intact	A multi-year plan will be developed including the development of performance goals. The implementation of this recommendation is dependent upon an order from the court.
Dropout Prevention and Alternative Programs			
D.213	Develop and implement an automated dropout student identification match program. This matching of "supposed dropouts" should be correlated from school to school and with other school districts to eliminate student transfers from the district's overall dropout and attrition rates.	Intact	The district has begun developing an automated dropout student match program that will be connected to the Personal Identification (PID) System through Region 9. The PID System will identify students enrolled in other districts in the state.
D.214	Review DISD alternative education programs to verify whether their objectives are being met as required.	Intact	Two district committees are currently deliberating on programs to be implemented in September 1993.

Rec #	Recommendations	Implementation Status	Comments
D.215	Propose the consolidation or broadening of the definition of "at risk" used by TEA. Special consideration should be given by both TEA and DISD to adopting the definition accepted by experts and used by many other districts and states.	Intact	DISD will continue its dialogue with appropriate authorities at TEA to ensure that all districts are reporting in accordance with the same definition. The state will be urged to adopt the definition accepted by most experts. TEA and DISD have broadened the definition of "at-risk" by adding a "pregnant or parenting student" to the definition.
D.216	Adopt a policy to ensure all evaluations, program plans and at-risk indices studies use the same at-risk student indicators. At-risk data, in general, should be collected and quantified more efficiently.	Intact	DISD is implementing this recommendation. The state, however, needs to ensure that all districts use the same definition for reporting purposes.
D.217	Perform district-wide evaluations annually on the implementation of the DISD at-risk plan to assess its effectiveness and efficiency in reducing the dropout rate.	Intact	This recommendation has been implemented. The state has changed the requirement for a separate district-wide at-risk plan. Individual campuses are to include dropout reduction as a part of their school improvement plan.

136

State Compensatory Education

D.218	<p>DISD should develop a new compensatory education program plan that establishes performance goals and identifies specific programs and services to accomplish them. This plan should:</p> <ul style="list-style-type: none"> - describe the program. - quantify the need for remedial education (a formal needs assessment). - contain measurable performance objectives. - design adequate target strategies. - provide indicators for a later evaluation. 	Intact	In conjunction with district-wide needs assessment and planning processes conducted during Spring 1993, specific plans for improving achievement in low-performing secondary schools were articulated. The Office of Strategic Planning, established under the reorganization for the 1992-93 school year, has assumed responsibility for this function.
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Rec #	Recommendations	Implementation Status	Comments
	<ul style="list-style-type: none"> - denote accountability, roles and functions of responsible parties. - delineate coordination linkages with other programs for at-risk students. - depict a scheduled action plan. - separate the use of state and federal compensatory funds. <p>The plan also should include criteria for assessing student progress, as well as historical trends and effectiveness measures.</p>		
D.219	Continue to analyze differences between low-performing and average schools and use this information to apply effective strategies to low-performing schools so that all indicators are brought in closer alignment.	Intact	DISD will continue to analyze differences among schools.
D.220	Prioritize SCE funds for more promising programs, such as the low-performing schools program, based on results of adequate program evaluations.	Intact	Based upon the results of a study of SCE funds, a new allocation procedure was implemented for the 1993-94 school year.
D.221	Annually compile all student remedial and compensatory needs, prioritize services and distribute the funds on an equitable basis.	Intact	New allocation procedures targeting low-performing schools were implemented for school year 1993-94, and will be reassessed annually in conjunction with district-wide needs assessment and budgeting activities.
Bilingual Education			
D.222	Establish procedures to correct the confusion surrounding budgeting and spending for bilingual and ESL instruction.	Intact	An allocation document has been developed that specifies per-pupil allocations for individual campus budgets. Responsibility for all bilingual funds has been placed with campuses.

Rec #	Recommendations	Implementation Status	Comments
D.223	Increase the disproportionately small amount of instructional operating expenditures devoted to bilingual/ESL education (0.2 percent); these expenditures should fall in a range between those found statewide (2.6 percent) and those found in comparative districts (5.1 percent).	Not Implemented	DISD intends to implement this recommendation as funding permits. However, due to budgetary constraints, the Bilingual Education/ESL Department budget has been reduced.
D.224	Ensure that the majority of funds allocated to bilingual/ESL education are spent on direct-instructional services.	Intact	DISD expends the overwhelming majority of its funds allocated to bilingual/ESL education on direct instructional services and related materials.
D.225	Provide additional in-service training on DISD budgetary policy and bilingual education budget procedures to principals and district-level personnel.	Intact	This recommendation is being implemented through the budget development process.
D.226	Move the spending authority for bilingual/ESL education from the Special Instructional Services Division to the principals, in line with DISD's commitment to school-based management.	Intact	Done.
D.227	Publish and provide to principals DISD policies on budget and expenditure authority for the funds appropriated to bilingual/ESL education.	Intact	Done.

Chapter 1 Regular and Migrant Programs

D.228	Develop a monitoring plan to ensure that Chapter 1 services in the Saturday School, Extended Day, Schoolwide Projects and Teacher Assistant programs follow program guidelines.	Intact	A monitoring plan will be developed to ensure that program guidelines are followed in all areas. The Chapter 1 staff closely monitors all program components.
D.229	Develop an evaluation design to evaluate the implementation and outcome of Chapter 1 Schoolwide Projects.	Intact	A recent comprehensive evaluation of Chapter 1 programs, including Schoolwide Projects, is complete. The design process for the 1993-94 evaluation of Chapter 1 is in progress.

Rec #	Recommendations	Implementation Status	Comments
D.230	Ensure that Chapter 1 funds used for Schoolwide Projects do not supplant rather than supplement funding for eligible Chapter 1 students.	Intact	Regular monitoring of Chapter 1 funds used for Schoolwide Projects will ensure that these funds supplement rather than supplant local funds. Schoolwide Project funds have been monitored through requisitions and on-site assistance with budgets.
D.231	Have the Evaluation and Testing Department assist the district and school-based leaders in developing measurable objectives for goals in program improvements.	Intact	The Program Evaluation Services Division has conducted workshops for all principals and provided technical assistance to schools in data interpretation and the development of measurable objectives for goals in program development.
D.232	Improve lines of communication, vertical and horizontal, between Chapter 1 personnel and support services.	Intact	Efforts to improve communication between Chapter 1 and support services personnel are underway.
D.233	Make the hiring of qualified Chapter 1 teachers and improved retention rates of Chapter 1 teachers a priority.	Intact	Hiring qualified teachers of Chapter 1 students has become a priority on each campus.
D.234	Monitor the implementation of recommendations set forth in the 1990-91 Chapter 1 Instructional Program Evaluation Report.	Intact	Most of these recommendations have been implemented. The Chapter 1 program is shifting to site-based models based on evaluation reports.
D.235	Require that the Chapter 1 director play a larger role in the development and focus of the PIP.	Intact	The director is expected to provide all assistance deemed necessary by the local campus planning committee. Principals direct the Parent Involvement Program in their buildings, but the Chapter 1 director and staff provide assistance to the local campus planning committee.

Rec #	Recommendations	Implementation Status	Comments
D.236	Develop greater coordination between Chapter 1 Regular, Compensatory Education Programs and the Migrant Education Program.	Intact	Efforts to ensure greater coordination between Chapter 1 Regular, Compensatory Education Programs and the Migrant Education Programs will be intensified. Eligible students will receive appropriate supplemental services. During the 1992-93 and 1993-94 school years, more money was allocated to each campus to provide appropriate supplemental services to students based on their records.

Chapter 2 - ECIA

D.237	Develop concrete measurable goals and objectives for each Chapter 2 component.	Intact	Concrete measurable goals and objectives were developed for each Chapter 2 component. This recommendation was incorporated into the evaluation design in the 1992-93 school year with a protocol established for future years.
D.238	Require component managers to develop, in conjunction with the Evaluation and Testing Department, a monitoring process to track the progress of activities within each component. This process would facilitate the accomplishment of goals and enhance the effectiveness of intervention strategies.	Intact	This recommendation was implemented during the 1992-93 school year.

Special Education

D.239	Develop and implement a plan for including special-education students in regular schools and classrooms, concurrent with the implementation of school-centered education.	Intact	DISD will continue to implement this recommendation through Project Homecoming, which is in its third year of a projected five-year run.
D.240	Eliminate inefficiencies and redundancies in positions and equipment caused by the separate MIS for special education.	Intact	DISD has asked the Department of Software Development to prioritize the integration of the special education and general education databases and to establish a timeline for completion. Updates will occur during the development of the district's technology migration plan.

Rec #	Recommendations	Implementation Status	Comments
Vocational Education			
D.241	Establish a mechanism to ensure that input from middle managers to supervisors receives a timely response.	Intact	This recommendation is being implemented.
D.242	Replace internal monitoring and evaluation teams with analyses of evaluative data now available for each school.	Intact	This recommendation will be implemented. CEO management reports currently are being generated for each school.
Gifted and Talented Education			
D.243	Issue an amendment to DISD's February 15, 1991 Report to the Court to correct the statistics presented on the numbers and racial/ethnic distribution of students enrolled in special programs for the academically gifted.	Intact	Done.
D.244	Continue to address the under-representation of minorities in the district's programs for gifted and talented students.	Intact	DISD has made progress and continues to monitor the under-representation of minorities in the gifted and talented program.
D.245	Ensure that the communications and planning problems discovered during the first-year implementation of the Laureate Program are resolved.	Intact	These problems have been resolved. The Gifted Program now is in the Curriculum and Instruction Services Division.
Facilities Management, Construction and Use			
D.246	Develop and maintain an accurate inventory of existing facilities.	Intact	This recommendation was accomplished during DISD's space utilization study (Summer 1993).
D.247	Transfer the sixth grade to middle schools as much as possible, within judicial requirements and community preferences, to more fully use approximately 10,000 excess student places in the middle schools.	Intact	The transfer has begun. The process will be reviewed on an ongoing and campus-by-campus basis. Although several DISD middle schools are successfully implementing the three-grade arrangement, the concept has not been popular with communities. DISD's recommendation to add a sixth grade at Hill Middle School for 1993-94 did not receive community approval.

Rec #	Recommendations	Implementation Status	Comments
D.248	Conduct a one-time major redesign of attendance zone boundaries to more fully use the excess capacity of currently underutilized schools within the constraints of judicial requirements and community preferences. After the one-time study, the boundaries can be appropriately maintained through minor annual adjustments.	Intact	The Office of Strategic Planning has developed attendance zone recommendations for 1993-94.
D.249	Conduct space usage studies of all schools which currently have both portable buildings and enrollments at less than capacity. All portables not needed should be sold.	Intact	The Strategic Planning Office conducted space utilization studies for all district schools during Summer 1993. Data are currently being compiled and analyzed. When this process is complete, the information will be available for district decision making.
D.250	Conduct a detailed analysis of the 454 acres of currently owned vacant properties and sell those properties for which no anticipated need exists.	Intact	This analysis has been completed by the new Office of Strategic Planning. The district is in the process of selecting a marketing firm.
D.251	<p>Find ways of more effectively using current excess high school space by:</p> <ul style="list-style-type: none"> - moving central office and area administrator offices from middle schools to high schools - using excess space for special contracts and grants or other projects, requiring additional space 	Intact	This recommendation is in the initial planning stage.
D.252	Develop a detailed plan for closing schools (which, because of poor locations and/or poor building conditions should no longer be operated) prior to building any additional school space, and either selling or leasing the vacated property.	Intact	This recommendation is still in the initial planning stage.
D.253	<p>Develop and adopt a comprehensive five-year facilities plan that includes:</p> <ul style="list-style-type: none"> - the adoption of a specific set of facility planning standards. 	Intact	The Strategic Planning Office will develop a comprehensive five-year facilities plan. This recommendation is still in the initial planning stage.

Rec #	Recommendations	Implementation Status	Comments
	<ul style="list-style-type: none"> - enrollment projections for each school and the DISD, as a whole, for five years into the future. - planned changes in attendance zone boundaries to fully utilize existing schools. - total gross square feet of school space needed. - total additional GSF of school space needed beyond current inventory. - a detailed structural and systems evaluation of each DISD facility using a standard evaluation instrument to determine the specific repair and renovations needs of each building. - a list of new schools to be built. - general locations of new schools. - the utilization rates of each school for each year of plan. - a list of schools to be closed and/or consolidated. - a list of properties to be sold or bought. - total future capital dollars needed for new construction and major repair and renovation. - planned sources of funding from bonds, existing tax revenues, sale of property, and other sources. - a time schedule for new construction and renovation projects and the sale or lease of released buildings. 		

Rec #	Recommendations	Implementation Status	Comments
D.254	<p>Consolidate the responsibility for facilities planning and budgeting in the recommended new Office of Planning and Budgeting by:</p> <ul style="list-style-type: none"> - transferring two educational facility planning positions from Plant Operations. - transferring one planning position from Curriculum and Instruction. 	Intact	<p>This recommendation is being implemented. Responsibility for facilities planning and budgeting has been consolidated in the Management Division.</p>
D.255	<p>Assign the following facility planning and budgeting responsibilities to the Office of Planning and Budgeting:</p> <ul style="list-style-type: none"> - developing and maintaining an accurate inventory of existing buildings. - analyzing attendance zone boundaries and recommending to the board appropriate changes in boundaries to efficiently utilize school facilities. - developing facility planning standards consistent with new TEA standards. - managing the purchase and sale of properties. - developing a detailed long-term facilities plan. - annually assessing the usage of existing facilities to ensure efficiency. - reviewing and approving requests for portable buildings. 	Intact	<p>These responsibilities have been assigned to the Management Division.</p>

Rec #	Recommendations	Implementation Status	Comments
D.256	Assign the Plant Operations Department responsibility for designing and managing all major new construction, repair and renovation projects and making annual assessments of repair and renovation needs for each school. The department's current long-term facilities planning and budgeting responsibility should be transferred to the Office of Planning and Budgeting. The department's responsibility for energy management, along with the position, should be transferred to the maintenance department.	Intact	This recommendation continues to be implemented.
D.257	Continue to use outside architectural design and construction management firms to manage major district construction projects.	Intact	Outside architectural design and construction management firms are being used to manage the current bond program.
Facilities Operations and Maintenance			
D.258	<p>Reorganize DISD maintenance operations to operate more efficiently as follows:</p> <ul style="list-style-type: none"> - combine the Plant Operations Department and the Building Improvement Division into a single division within the Maintenance Department. - transfer the energy management function currently in the Plant Operations Department to the energy management unit in the HVAC Division of the Maintenance Department. - reassign the Roofing Division as a unit within the Central Maintenance Division. - reassign the HVAC Division as a unit within the Maintenance Services Division. 	Modified	The maintenance operation was reorganized. However, Roofing and Plant Operations remain separate units. This recommendation was completed in September 1992.
D.259	Eliminate the Central Maintenance Supervisor position in the HVAC Division and the Field Supervisor position in the Maintenance Department.	Intact	Done.

Rec #	Recommendations	Implementation Status	Comments
D.260	Conduct a detailed study of all current work processes to identify ways of increasing staff productivity.	Intact	Done.
D.261	Eliminate the separate HVAC work-order tracking system and have the central work-order tracking system process all orders.	Intact	Done.
D.262	Develop and implement a plan for reducing the number of work orders pending for more than 120 days.	Intact	Done.
D.263	Redesign the schedule of planned maintenance teams to base the amount of planned time at each facility on a pre-assessment of the facility's repair and renovation needs.	Intact	New planned maintenance schedules have been developed as per this recommendation and are scheduled for implementation during 1993-94.
D.264	Develop a plan for using planned maintenance teams during times when they finish early at a facility and cannot start at the next facility.	Intact	See above.
D.265	Pilot-test a program that works maintenance teams after school hours. Also, reconsider the use of a four-day/ten-hour work week for maintenance workers. Choose the system that is most cost-effective for the district.	Intact	This recommendation will be implemented and extended to include other measures of flexible scheduling. This recommendation will be implemented in the 1993-94 school year.
D.266	Reduce the district's number of custodians through attrition.	Intact	A study has been completed and adjustments will be made during the 1993-94 school year.
D.267	Develop a program of incentives and discipline for reducing the absenteeism of custodians and custodian supervisors. Some of the personnel incentive programs used by the County School Board Transportation System should be considered as models.	Intact	A program for reducing absenteeism is in progress. An ad hoc committee comprised of Maintenance Services personnel is developing recommendations for this program. These recommendations are scheduled to be completed by January 1994.
D.268	Conduct an internal audit of the use of custodial supplies and implement a more restrictive inventory control program.	Intact	This audit was conducted by the newly-created Audit Department and completed in August 1993.

Rec #	Recommendations	Implementation Status	Comments
D.269	Abolish the policy of assigning a minimum of two maintenance staff per vehicle and establish a program of assigning staff in accordance with the staffing needs of each set of work assignments.	Intact	Done.
D. 270	Implement a formal work management system that: <ul style="list-style-type: none"> - eliminates unnecessary work tasks. - eliminates bottlenecks and idle staff time. - establishes work standards by task. - monitors and holds staff accountable for achieving expected productivity standards. - rewards and disciplines staff in accordance with productivity. - maintains a plan for meeting peak workloads and using excess staff time during low workload demand periods. - budgets maintenance and custodial staff in accordance with estimated workloads and expected staff productivity. - holds managers accountable for staff productivity. 	Intact	This recommendation will be implemented during the 1993-94 school year.
D.271	Conduct a detailed workload analysis of custodian services to develop a more detailed budget allocation formula that relates the number of custodians budgeted for each school to the workload at each school.	Intact	This recommendation will be implemented during the 1993-94 school year.

Property Services and Warehousing

D.272	Conduct a detailed cost-benefit analysis of consolidating maintenance facilities, warehouses, shops, and vehicle parking into a fewer number of well-designed facilities.	Intact	This recommendation will be implemented during the 1993-94 school year.
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Rec #	Recommendations	Implementation Status	Comments
D.273	Upgrade the current warehouse inventory program to include information on over-the-counter requests for items not in stock.	Intact	This recommendation will be implemented during the 1993-94 school year.
D.274	Require schools to submit equipment and supply needs in accordance with the district's purchasing schedule to ensure timely delivery to the schools and obtain maximum price breaks.	Intact	This recommendation is being implemented.
D.275	Re-evaluate the benefits of the district's internal computer repair service and consider a fixed-price contract for annual service on all instructional and administrative computers.	Intact	Plans are in progress to solicit fixed priced computer maintenance contracts to service computer repairs. PCs that vendors consider obsolete may not be included in the maintenance contracts.
D.276	Combine the repair service for vacuum cleaners and furniture under the Service Center.	Intact	Done.
D.277	Continue to study the construction of a single site facility for the maintenance and warehouse functions.	Intact	This recommendation is being implemented.

148

Food Services

D.278	Establish a formal work-management system for warehouse and distribution operations to ensure the operational efficiency of the food-service warehouse.	Intact	DISD will implement this recommendation upon receipt and evaluation of recommendations from a consulting company.
D.279	Immediately establish a contingency plan in case the new warehouse is not operational by the beginning of the 1992-93 school year.	Intact	The warehouse has been operational since the beginning of the 1992-93 school year.
D.280	At the end of the 1992-93 school year, conduct an evaluation of DISD warehouse operations to determine if a district warehouse is more cost-effective than the use of a private vendor.	Intact	The evaluation was conducted by a consulting firm, Inteam Associates, Inc. A report should be issued shortly.

Rec #	Recommendations	Implementation Status	Comments	
Transportation				
D.281	Transfer the responsibility for planning, evaluating, and managing the district's telephone systems from the Plant/Transportation Department to the Management Information and Technology Services Department.	Intact	This recommendation has been implemented. Repairs will remain in the Radio and Alarm Department.	
D.282	Employ transportation coordinating staff two weeks before the beginning of the school year to plan and design the routes for the new school year.	Intact	Done.	
D.283	Transfer the responsibility for managing the utilization of and custodial services for administrative buildings to an administrative assistant position reporting to the division executive.	Intact	This recommendation was implemented during the 1992-93 school year.	
Vehicle Acquisition and Maintenance				
149	D.284	Either locate and lease or build a new vehicle maintenance garage large enough to consolidate all vehicle maintenance in a single garage.	Intact	Done.
	D.285	Establish a state-of-the-art fleet management system that can track and identify unusual expenses for vehicles.	Intact	Done.
Safety and Security				
	D.286	Continue support of security programs with the City of Dallas to address societal conditions that generate juvenile crime.	Intact	The superintendent and deputy superintendent have personally implemented this recommendation.
	D.287	Upgrade equipment in the communication center and at school sites to better monitor buildings.	Intact	DISD has purchased walk-through metal detectors, hand-held detectors, photo I.D. systems and camera monitoring equipment. Twenty additional security systems have been obtained to target high-offense schools.

Rec #	Recommendations	Implementation Status	Comments
D.288	Install monitoring devices in portable buildings for protection against vandalism.	Intact	Additional panic-button systems have been purchased for portables without security systems. A number of phone installations have also been made in portables.
D.289	Install crash bars on all school exterior doors.	Intact	This recommendation is complete for approximately 95 percent of DISD schools.
D.290	Increase the central control staff by two to provide back-up for current staff and reduce overtime.	Intact	Two additional positions have been approved and funded and central control is housed with the total Security Department.
D.291	Add one position at the Ervay Security office to lend back-up to dispatch operations.	Intact	Two additional positions have been approved and funded.
D.292	Increase the involvement of student organizations and student leaders in crime prevention programs.	Intact	This recommendation is being implemented.
D.293	Expand the Safe Schools Program to include city-wide school security issues. Involve local law enforcement, legal professionals and the community at large.	Intact	This recommendation is being implemented.
D.294	Increase focus on prevention and intervention training activities. Work with elementary schools and emphasize future prevention by educating youths on safety and security issues.	Intact	This recommendation is being implemented.
D.295	Increase training related to student safety and security procedures.	Intact	This recommendation is being implemented.
D.296	Urge the city to expand programs dealing with socialization and citizenship for the area's large population of recent immigrants.	Intact	The superintendent has instituted a program of Character, Citizenship and Leadership Education for implementation in schools and District offices beginning 1993-94.
D.297	Increase collaboration with the juvenile justice system and provide a program and site to work with students expelled for weapon possession.	Intact	This recommendation already has been implemented through a grant with the Juvenile Justice Department.

Rec #	Recommendations	Implementation Status	Comments
D.298	Establish a continuing program of collaboration with other districts to see what works in prevention and Intervention programs.	Intact	This recommendation is being implemented.

Lake Travis ISD

Period of TSPR review: 5/91-7/91

Consultant: KPMG Peat Marwick

Estimated savings from TSPR recommendations: \$533,000

Rec #	Recommendations	Implementation Status	Comments
Organization and Staffing			
LT.1	Eliminate two of five administrative secretarial positions.	Intact	Two of the five positions were eliminated. One additional clerical position was eliminated in the Finance Division.
LT.2	Eliminate two administrative positions.	Intact	Two administrative positions were eliminated.
LT.3	Evaluate the district's use of the student assistant coordinator position.	Intact	This position was eliminated.
LT.4	Combine two nursing positions.	Intact	Two nursing positions were combined, eliminating one nursing position.
LT.5	Evaluate campus staffing and consider consolidating positions at secondary campuses.	Not Implemented	The district has considered consolidating secondary campus staffing; however, due to a significant increase in the student population, the district feels that consolidation is not feasible.
Purchasing Review			
LT.6	Raise the maximum amount of a general-purpose activity fund expenditure to \$100.	Intact	Done.
LT.7	Determine the actual and standard (market) costs involved in processing purchase orders (POs).	Not Implemented	
LT.8	Complete a policy and procedure document regarding emergency purchases for addition to the current board-approved policy manual.	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
LT.9	Develop analysis procedures and include them in board-approved policy.	Not Implemented	Not implemented as of yet, but scheduled for review.
LT.10	Draft and communicate policies and procedures regarding quotes on purchases of less than \$5,000 and more than \$1,000.	Intact	Done.
LT.11	Cease distribution of pre-numbered POs to campuses and support functions.	Not Implemented	
LT.12	The superintendent should stop reviewing POs for less than \$1,000.	Not Implemented	

Accounting and Finance

LT.13	Complete a fixed-asset inventory process as soon as possible and update the prior year's subsidiary ledger to reflect the historical costs of fixed assets acquired prior to the 1988-1989 school year.	Intact	An inventory has been completed and historical costs have been recorded where possible.
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Cash Management

LT.14	Add a board-approved policy regarding the optimal mix of different investment types to the district's investment policy.	Intact	The district has implemented changes to maximize safety, rate of return and liquidity. (All excess funds currently are being placed with TexPool.)
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Payroll

LT.15	Transfer responsibility for adding and deleting employees from the master payroll file to the Personnel Department.	Not Implemented	The district has not implemented this recommendation due to regional education service center (RESC) data-processing limitations.
LT.16	Develop policies and procedures concerning non-delivered payroll checks.	Intact	Such procedures are in place.

Rec #	Recommendations	Implementation Status	Comments
LT.17	Develop procedures concerning payroll processes; key roles and responsibilities within the Payroll and Personnel Departments; consistency with federal, state and local regulations; identification of all reports used and generated during the payroll process, and descriptions of their uses; identification of exception circumstances that justify exceptions to normal procedures, and payroll system overview and procedures.	Intact	Procedures have been implemented in all areas of this recommendation.
LT.18	Periodically change passwords used to access any district computer system, particularly those related to payroll.	Intact	Done.
LT.19	Increase efforts to sign up as many employees as possible for direct deposit.	Intact	The district encourages participation in direct deposit by allowing employees to sign up at any time and by forwarding reminders of this benefit to non-participants annually.
LT.20	Consider using time clocks for hourly employees.	Modified	Time clocks are being used in maintenance and transportation.

Data Processing

LT.21	Develop a long-range information technology plan.	Intact	Done.
LT.22	Establish user committees to focus on instructional and operational issues regarding information technology.	Not Implemented	
LT.23	Implement a plan to provide for the systematic backup of all local data resources.	Intact	Initial planning for implementing this recommendation has begun.
LT.24	Back up quarterly files and store them off-site at a secure location.	Not Implemented	The majority of the district's data is stored by the Region 13 education service center. No policy has been implemented for individual employee's back-up of data.

Rec #	Recommendations	Implementation Status	Comments
Transportation			
LT.25	Increase the budgeted time allowed for the Transportation Department's part-time computer operator position.	Not Implemented	
Transportation - Staffing and Personnel Management			
LT.26	Log and monitor training received by the Transportation Department's drivers on a computer.	Not Implemented	The Transportation Department monitors staff training; however, the district feels a computer is not required due to the small number of employees.
LT.27	Eliminate standby driver positions.	Intact	Two standby driver positions have been eliminated. Because absenteeism has a direct impact on the need for standby drivers, the district also decreased the number of paid sick-leave days from 12 to seven days.
LT.28	Develop a performance evaluation checklist, and use the checklist regularly to evaluate the performance of district school-bus drivers.	Not Implemented	During 1992, a "Blue-Ribbon Team" composed of community volunteers performed a six-month comprehensive study of Lake Travis' transportation system. Many issues addressed by TSPR were considered, as well as other issues. Recommendations put forward by the team have allowed the district to substantially reduce its transportation spending while serving a larger number of students.
LT.29	As wage increases become available, reward drivers for good performance and length of tenure.	Not Implemented	
LT.30	Adopt a policy of testing for drug and alcohol use after any accident.	Not Implemented	
LT.31	The Transportation Department should log accidents and report its accident rate at least annually to district management.	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
LT.32	In the event of a preventable accident, the Transportation Department should consider assigning appropriate retraining to the driver involved.	Not Implemented	
Transportation - Routing, Scheduling, Operations and Performance			
LT.33	Stagger school starting times to make more efficient use of school buses.	Intact	LTISD has adopted staggered school start times that allow the same buses to run multiple routes.
LT.34	Establish a standard policy for walking distances to bus stops, such as a maximum of one-half mile, unless a hazard threatens pupil safety.	Not Implemented	
LT.35	Require the Transportation Department to log all early and late runs and all complaints and commendations.	Not Implemented	
LT.36	Review extracurricular trips; contract for buses for some trips, rather than buying new buses or paying additional drivers.	Not Implemented	
LT.37	Require the Transportation Department to develop a checklist itemizing the standard steps of preventive maintenance inspections.	Not Implemented	
LT.38	Require the Transportation Department to track the number of vehicle breakdowns and their causes.	Not Implemented	
LT.39	Require the Transportation Department to implement its plan for a work-order system.	Not Implemented	
LT.40	Implement plans to conduct a physical inventory of transportation maintenance parts and supplies this summer, and conduct future inventories at least annually.	Not Implemented	
LT.41	Require the Transportation Department to list parts it frequently uses, estimate the number it will use each year and request that several qualified vendors provide their best bid price to supply a year's worth of parts to the district.	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
LT.42	Require the Transportation Department to competitively contract with local garages to perform bus repairs that the district is not equipped or qualified to make.	Not Implemented	
LT.43	If the district alters its transportation facility, or significantly expands the number of routes it operates, it should consider expanding the space available for school bus repair.	Not Implemented	
LT.44	Defer purchases of new buses until the district's spare ratio (the ratio of spare buses to the total fleet) is reduced to 10 percent of the number of regular routes it operates <i>plus</i> the number of buses reserved for extracurricular trips. Alternatively, sell extra buses.	Not Implemented	

Maintenance and Custodial

158	LT.45	Prepare an inventory of district buildings and other facilities.	Intact	Done.
	LT.46	Following development of this inventory, develop a schedule of preventive maintenance inspection points and frequencies.	Intact	Done.
	LT.47	Require Maintenance Department managers to meet regularly with administrators at school campuses to review and discuss maintenance performance and priorities for major projects.	Intact	Done.
	LT.48	Establish a more detailed policy for prioritizing maintenance work.	Intact	Done.
	LT.49	The Director of Maintenance should continue to set priorities on a day-to-day basis, but priorities for major projects should be set by district administration with input from campus administrators.	Intact	Done.
	LT.50	When a work request is received, the Maintenance Department should notify the requester of the estimated scheduled completion date if the work will take longer than three days to complete.	Not Implemented	The district is reviewing this recommendation.

Rec #	Recommendations	Implementation Status	Comments
Personnel Management			
LT.51	Implement a regular employee performance evaluation program for all Maintenance Department staff.	Intact	Done.
LT.52	Adjust custodial schedules so that a lead custodian at the elementary school is on duty during the evening shift and a lead custodian works the evening shift at the middle school. Alternatively, a lead custodian from the high school could spend part of the evening shift at the middle school.	Intact	Done.
LT.53	Install a time clock at each school and require custodial staff to clock in and out at the beginning and end of their shifts.	Intact	Time clocks are being used by maintenance staff.
LT.54	Adjust custodial schedules to include a percentage of unassigned time to permit the accommodation of special projects, absences, vacancies and cleaning required at infrequent intervals.	Intact	Done.
Material, Supply and Equipment Management			
LT.55	Determine vendor interest in competitively bidding on a single contract for a large group of district consumable supplies. Alternatively, the district may wish to evaluate the savings available from purchasing through state-negotiated contracts.	Intact	Done.
LT.56	Prepare a physical inventory of major materials and supplies on hand at least annually, and monitor their use.	Intact	Done.
Food Services			
LT.57	Analyze the causes of low Food Service usage.	Not Implemented	
LT.58	The district should charge Food Service Department utilities, insurance and trash removal costs to the Food Service fund.	Intact	Done.

Rec #	Recommendations	Implementation Status	Comments
LT.59	The assistant superintendent should complete an inspection of each kitchen on a monthly basis.	Intact	Done.
LT.60	Maintain a manual listing of the food cost of each item. Base meal price adjustments on these costs.	Intact	Done.

Lubbock ISD

Period of TSPR review: 5/91-7/91

Consultant: Deloitte & Touche

Estimated savings from TSPR recommendations: \$1,684,000

Rec #	Recommendations	Implementation Status	Comments
Curriculum and Instructional Services			
L.1	Implement effective program and process evaluations to assess curriculum programs, instructional delivery, instructional techniques, material use and related areas.	Intact	The district has reassigned roles and responsibilities relating to program and process evaluation and hired a research and evaluation specialist to review evaluation methodologies.
L.2	Continue to plan for instructional improvement by identifying short- and long-term goals.	Intact	The district will continue to develop, review and modify instructional plans for program evaluation. The district also will implement plans provided by the Campus Performance Objectives Councils and establish procedures for reporting planning accomplishments to the superintendent and Board of Trustees.
L.3	Create a Division of Curriculum and Instructional Services.	Intact	The district has created a Division of Instructional Services that includes Elementary Operations, Secondary Operations and Instruction.
L.4	Assign responsibility for monitoring the use and evaluation of curriculum guides to curriculum coordinators and principals. Develop mechanisms to gather teacher feedback on the quality and usefulness of these guides.	Intact	These responsibilities have been assigned. The district is proceeding with implementation of this recommendation.
L.5	Assign Information Systems' user consultant responsibility for coordinating with Instructional Services personnel to ensure the compatibility and cost-effectiveness of the two divisions' technology purchases.	Modified	The district's Technology Committee has been assigned to coordinate instructional technology purchases. The committee is developing specifications for general hardware and software purchases, and is establishing a procedure to review requests for instructional technology.

Rec #	Recommendations	Implementation Status	Comments
L.6	Expand the district's magnet programs.	Intact	The district has designated a position of director of Magnet Programs; this person will develop a plan for an expansion of magnet programs.

Finance and Risk Management

L.7	Implement additional risk-management initiatives, including comprehensive safety policies; appropriate safety training programs for district employees; proof of automobile liability insurance held by employees who use personal vehicles on district business, and campus safety committees at each school. Consider instituting a "lock-down" program for the district's valuable equipment, such as computers, VCRs and televisions.	Intact	A comprehensive Loss Prevention and Safety Program was completed on September 1, 1992.
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L.8	Develop a policy and procedures manual for all accounting functions. Improve internal controls over the district's check stock. Revise district investment policies to allow for greater flexibility.	Modified	The accounting manual has been completed. Unused check stock is stored in a vault that can be accessed by accounting staff only during the day. To provide additional security for check stock would require the construction of additional secure areas or the purchase of secure cabinets, which are not economically feasible at present. The district has adopted more flexible investment policies.
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Food Service

L.9	Improve the district's oversight and monitoring of food service operations to improve productivity and profitability.	Intact	Monthly operating statements are reviewed jointly by the Food Service manager and the district's Contract Services director. All factors affecting productivity, efficiency and profitability are being reviewed, including labor assignments, labor costs per meal served and total cost per meal per location. Scheduling methodologies, food and related items, purchasing methods, cooking and work methods, training and program participation rates are being studied.
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Rec #	Recommendations	Implementation Status	Comments
L.10	In cooperation with the food service contractor, eliminate the operating deficit.	Intact	<p>The food service contract has been rebid to include additional controls and tighten the district's oversight. Meal prices were increased incrementally over the last two school years. The district has increased participation in its free and reduced-price lunch program by conducting special drives and publishing the program guidelines in the local newspapers, direct mailings and "send-home" pamphlets. The district also is exploring cost reduction through centralized food preparation and the combination of various sales outlets in small schools.</p> <p>To supplement district income, the board also has extended food services to the All Saints School (140 meals per day).</p>
Housekeeping			
L.11	Revise current staffing methodologies to reflect requirements for specific cleaning tasks, frequencies, work methods and equipment use.	Intact	<p>Custodians are no longer responsible for "child plate care," which involves helping elementary children dump food waste, paper goods, utensils and trays. This change alone has allowed the district to reallocate more than 7,000 staff hours each year. "Child plate care" is now the responsibility of ARA Food Service. Marriott (the district's custodial contractor) has responded to attendance changes by shifting workload assignments to meet actual needs, taking into account the age of buildings, the number and condition of portable buildings at each campus and the number of special education students. Marriott has also analyzed cleaning tasks, frequencies, work methods and equipment usage and presented the district with a comprehensive staffing plan that better uses personnel and improves the operation's overall efficiency. Additional equipment has been purchased that also will improve housekeeping productivity and efficiency.</p>

Rec #	Recommendations	Implementation Status	Comments
Information Systems			
L.12	Adopt a consistent systems-development methodology supported by information engineering concepts and carefully defined systems design and programming standards.	Intact	This is an ongoing process performed by the Information Systems Division.
L.13	Modify operational practices to improve the regulation of computer equipment and software purchases, establish job accountability standards and improve program change management.	Intact	LISD is currently evaluating and adopting standards for hardware and software purchases and has purchased, at a cost of \$6,500, a Change Management System.
Internal Audit			
L.14	Enhance the effectiveness of internal audit functions through the preparation of mid-year update or status reports and the development and implementation of a quantitative "risk-scoring" system.	Not Implemented	<p>LISD maintains that a mid-year status report would not provide useful information to its finance committee. At mid-year (February), the audit department has not completed any internal audits. The first half of each year is spent providing direct assistance to the district's external auditors and preparing the audit report and comprehensive annual financial report.</p> <p>In the future, a status report detailing the audit department's progress towards meeting goals of the audit plan will be presented to the finance committee each time an audit report is presented.</p> <p>The Internal Audit Department identifies "auditable" areas within the district and prepares an annual audit plan based on risk considerations and the current concerns of the finance committee, senior management and the internal auditor. Considering the department's current staffing levels, LISD believes this to be the most efficient manner for scheduling internal audits. The district believes these considerations provide the same basic results as a risk-scoring system.</p>

Rec #	Recommendations	Implementation Status	Comments
L.14 (cont.)			As scheduling permits, the district's internal auditor will research available risk-scoring systems for possible inclusion in the audit planning process.
Maintenance and Capital Projects			
L.15	Modify the current maintenance services contract and contract only for management expertise, rather than staff.	Not Implemented	LISD disagrees with this recommendation. Among other issues, the district maintains that reverting to in-house maintenance workers would cause the district's payroll to increase by 7.65 percent for additional social security payments. The district also cites the high cost of workers' compensation and other staffing costs.
L.16	Establish a cost-reimbursement-plus-fee contract with a pre-defined, guaranteed maximum limit on all costs.	Modified	<p>The contract was re-negotiated for the 1990-91 school year, and amended for 1991-92. Many maintenance services are provided under the base contract and resemble a form of "cost-plus" contract. Special projects are defined in the contract and explicitly defined as "cost plus." Bills are randomly audited by the Purchasing and Contract Services Department and are subject to audit by the internal and external auditors.</p> <p>LISD also stated that converting to a 100-percent cost reimbursement plan would require the district to audit practically every expense incurred by the contractor at one time or another during the year, a requirement that would require additional staffing.</p>
L.17	Require the maintenance contractor to provide an annual justification for all contract management positions.	Intact	This has been district practice since November 1989. Each year, the contractor's complete employee complement (management as well as clerical and hourly positions) is reviewed. Personnel additions, deletions and changes are fully reviewed and must be approved by the district.

Rec #	Recommendations	Implementation Status	Comments
L.18	Require the maintenance contractor to provide information on repair and maintenance costs for facilities and equipment.	Intact	Future semi-annual joint review committee meetings will include this information.
L.19	Develop an equipment replacement program based on age, repair costs and usage.	Intact	Decisions to replace equipment now are based on age, condition, past repair cost and normal scheduled usage. LISD's contractor is preparing a five-year equipment replacement schedule based on these factors.
L.20	Involve maintenance personnel in the major phases of capital project development and construction.	Intact	Done. Normally, maintenance representatives attend pre-construction conferences and a year-end maintenance warranty meeting. The district has expended considerable effort to bring maintenance up to date with all specifications, drawings and warranties.
L.21	Develop documentation files relating to the location of hazardous materials and planned remediation efforts.	Intact	Marriott has detailed files relating to the location and classification of hazardous materials. Material safety data sheets are kept on file for every type of hazardous material. The district's Energy Management Department maintains extensive documentation of the location and condition of all asbestos in the district. Long-term plans have been established for asbestos remediation.
L.22	Study the district's past insurance coverage to assess the feasibility of filing insurance claims to offset asbestos abatement expenses.	Intact	The district will review and evaluate prior insurance policies to see if coverage exists.
L.23	Develop a district facilities master plan and a five- to ten-year plan for capital improvements.	Intact	Marriott has submitted a detailed capital improvement plan and intends to develop a five-year plan as well as a continuing long-term plan.

Rec #	Recommendations	Implementation Status	Comments
Personnel			
L.24	Modify the human resources information system to include a position-control function that interfaces with the budget system, performance appraisal monitoring, salary administration and benefits administration.	Intact	The district has purchased a human resource package that is compatible with existing software and contains modules to track employee and applicant histories, provide for position control and allow the district to track substitute needs and match them with applicants. The package also interfaces with the district's budgeting package so that, as individuals are hired, data are automatically fed into the budget preparation package and the payroll module. The package's employee history function also tracks staff development, employee evaluations and appraisals.
L.25	Create a district-wide compensation policy that compares district compensation levels with the external market, both local and national.	Intact	The district now analyzes salary schedules and other information published by Educational Research Service, as well as other data regarding salaries.
L.26	Use teachers who participate in staff-development programs outside of the district as in-house trainers.	Intact	Employees who attend seminars, conferences or workshops at district expense now serve as presenters and trainers for formal district staff development courses.
Planning, Research and Evaluation			
L.27	Perform effective program and process evaluations to assess curriculum programs, instructional delivery, instructional techniques, material usage and other areas.	Intact	LISD plans to contact ten to 15 Texas school districts to identify appropriate performance measures and evaluate tools that could be used to improve LISD's evaluation process. The district also has created a director position for Research and Evaluation.

Rec #	Recommendations	Implementation Status	Comments
L.28	Assign responsibility for test administration and score analysis to Planning, Research and Evaluation to improve the district's usage of test results.	Intact	LISD plans to appoint a transition team to develop a plan for transferring test administration and score analysis responsibilities to the newly-created subdivision for Research and Evaluation. Under the direction of the new director for Research and Evaluation, testing functions will be integrated and coordinated with performance evaluation.
L.29	Move Planning, Research and Evaluation staff functions within Administrative Services to other areas of the district organization and have them report directly to the superintendent or deputy superintendent.	Intact	The superintendent's revised organization plan was approved by the Board of Trustees on September 16, 1991. Under that plan, Research and Evaluation and Guidance now are supervised by the executive director for Planning and Development.
Public Information			
L.30	Create a media-management training program to improve the ability of district personnel to interface effectively with the media.	Intact	The Public Information Office has held workshops to train staff on district policies concerning media relations. Central-office administrators, principals and school representatives also were given a workshop on media relations. A media relations and communications handbook has been distributed to individuals who routinely talk with the press.
Purchasing			
L.31	Modify the purchasing system to complete the expenditure control function prior to purchase-order processing.	Not Implemented	LISD maintains that this recommendation would require an electronic requisitioning system at the campus and department levels, an expenditure that cannot be justified at present. The site-based management philosophy makes budgetary control via monitoring, monthly budget reports, training and counseling more appropriate.

Rec #	Recommendations	Implementation Status	Comments
L.32	Provide training in the purchasing process for district support staff.	Intact	The district's ongoing training program has been expanded to cover procurements.
L.33	Improve information relating to the purchasing process. Create a security area in the warehouse for storing valuable items.	Intact	<p>LISD has developed a detailed purchasing policy and procedures manual that discusses purchasing and requisitioning, the use of payment authorizations, purchase orders, receiving and delivery, fixed assets, textbook administration and major contracted services.</p> <p>A large cold-storage vault previously used by food services is being used to store high-value items as well as sensitive items such as achievement tests. Access is limited to one door, and only the Distribution Center supervisor has a key to it.</p>
Safety and Security			
L.34	Develop standards for district security operations.	Intact	LISD has asked the National Association of School Safety Directors to conduct a district-wide school security audit.
L.35	Develop a comprehensive district-wide crisis management plan.	Intact	A crisis management plan will be written.
L.36	Develop a Safe School Program at district schools.	Intact	The district plans to hire a safety specialist to implement the Safe School Program. This specialist also will be responsible for all other district-wide safety programs.
L.37	Implement an alarm, lock and key management system for district facilities.	Modified	LISD is allocating small amounts each year to accomplish this.
L.38	Pre-plan for the security of new equipment orders.	Intact	Done. All new equipment and merchandise must be delivered to Central Receiving, where it is assigned a fixed-asset number and tag. Central Receiving then delivers the goods to the campuses.

Rec #	Recommendations	Implementation Status	Comments
School Management			
L.39	Continue to assess alternatives for improving the utilization of existing school facilities.	Intact	LISD has converted one high-school facility into a junior high and built an additional junior-high facility. The district is studying further shifts to prevent overcrowding.
L.40	Develop a site-based management plan, including a realistic implementation strategy and schedule.	Intact	Development and implementation of this plan is under way. The written plan will be addressed following completion of work on strategic planning.
L.41	Require the Planning, Research and Evaluation Department to develop an evaluation methodology and tools that will allow for accurate assessments of the educational effectiveness of specific campus-based programs.	Intact	LISD has developed this methodology and has made an evaluation component part of each campus action plan.
L.42	Develop a program to identify and train current employees to become principals within the district.	Intact	This already was being done through a mentorship program.
Transportation			
L.43	Modify the district's contract with Durham Transportation to include specifications for services and service levels. Specific contract provisions would include specifications for maximum loading and ride time. Additionally, the contract should specify expectations of service efficiency and effectiveness.	Not Implemented	LISD does not agree with this recommendation and does not feel that detailed specifications are in the district's best interest. The district feels its current service arrangement is working extremely well.

Rec #	Recommendations	Implementation Status	Comments
Governance			
L.44	Continue the refinement and implementation of a formal strategic planning process. Ensure that the process provides for adequate consideration of all aspects and functional components of the district's operations.	Intact	The 13 action teams operating within the current LISD strategic plan each submit separate plans for a specific strategy. A 30-member planning team reviews each plan, and forwards approved plans to the Board of Trustees each December or January. Specific district objectives will be developed through the strategic planning process. Additional aspects of district operations (such as information technology, facilities, instructional support and human resources) will be incorporated in the strategic planning cycle as soon as possible.
Planning			
L.45	Build upon the district's current strategic planning process to ensure that it is sufficiently broad to incorporate plans for all aspects of district operations.	Intact	The district will incorporate plans for all aspects of its operations, including future construction, food service and transportation, in its strategic planning process.
Budgeting			
L.46	Modify the budget system to include expenditure control prior to the processing of purchase orders, position control and variance reporting capability.	Not Implemented	LISD disagrees with this concept because it believes its current practices are adequate.

Rec #	Recommendations	Implementation Status	Comments
L.47	Provide additional information relating to the budget-development process and budget administration to all campus administrators. Provide for the development of a multi-year budget forecast.	Intact	<p>Each manager with budget responsibilities has been given a board policy manual explaining LISD's budget policies. Specific budget procedures as well as the board-adopted budget calendar are circulated to each budget administrator at the onset of the budgeting process each year. In addition, several budget workshops are conducted during the initial stages of the budgeting process to explain step-by-step procedures to budget administrators.</p> <p>Administrative staff currently provide the Board of Trustees with a five-year forecast of revenue, expenditures and changes in fund balances.</p>
L.48	Revise the monthly budget reporting format to reflect actual revenue and expenditures against the original budget as well as the most recent quarterly forecast, on a monthly and year-to-date basis, with related variances.	Intact	Done.

172

Performance Appraisal

L.49	<p>Modify the performance appraisal process by:</p> <ul style="list-style-type: none"> - creating a series of specific performance-appraisal instruments for "families" of similar or related jobs. - incorporating self-evaluations. 	Not Implemented	<p>This recommendation was not implemented because state law and State Board of Education rules require that teachers be evaluated with the Texas Teacher Appraisal System (TTAS) appraisal instrument. Administrative staff, whose appraisal is based on TEA-mandated criteria, must be appraised with the instruments currently in place.</p>
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Rec #	Recommendations	Implementation Status	Comments
	<ul style="list-style-type: none"> - making planning toward individual career goals an integral part of the appraisal process. - devising a teacher appraisal process that includes at least one unscheduled observation as a part of each teacher's annual appraisal. 		<p>LISD is considering consolidating all counselors, librarians, nurses, therapists and educational diagnosticians into job families. The district will consider using self-evaluation for all employees as part of the appraisal process.</p> <p>The district will review its appraisal instruments to determine the value of an additional section on short- and long-range career goals.</p> <p>By TEA mandate, 50 percent of all appraisal observations must be conducted within a window (for instance, a given week), while the other half can be specifically scheduled.</p>
L.50	<p>Modify the performance-appraisal process to focus on annual user training. Create an improved methodology for compiling and using performance-appraisal data.</p>	Intact	<p>The district will provide appraisers with annual training in the use of all appraisal instruments other than the TTAS performance appraisal instrument.</p> <p>The district currently is considering implementing a process for completing, analyzing and disseminating data related to employee appraisals. This would be accomplished through the development or purchase of computer software.</p>
Organization, Staffing and Compensation			
L.51	<p>Assign overall responsibility for instructional leadership and delivery to the deputy superintendent of Instruction.</p>	Intact	Done.
L.52	<p>Reorganize the Division of Instructional Services into the Division of Instruction, with a focus on classroom teaching rather than support activities.</p>	Intact	<p>These issues were implemented in a new organizational chart adopted on September 16, 1991. The new organizational scheme addressed the span-of-control, responsibility and accountability issues raised by TSPR. Further changes have been made since this initial effort.</p>

Rec #	Recommendations	Implementation Status	Comments
L.53	Create two positions of area assistant superintendents for Instruction, reporting to the deputy superintendent.	Intact	See above.
L.54	To improve the alignment of responsibilities, eliminate the Division of Administrative Services and assign its functions either to Business or Instructional Services.	Intact	See above.
L.55	Assign capital projects and personnel functions to the Division of Business Services.	Intact	See above.
L.56	Assign student services and health services to the new Curriculum and Instruction Division.	Intact	See above.

Innovative Programs

L.57	In conjunction with the Comptroller's management audit of Texas school districts, identify opportunities to share LISD program innovations with the management and staff of other school districts. Monitor TSPR audit findings to identify innovations developed in other districts that may be applicable to LISD.	Intact	The district is sending staff to various conferences to learn about successful programs. In addition, LISD continues its dialogue with other school districts, and also stays current with periodicals and books related to innovations.
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Richland Spring ISD

Period of TSPR review: 5/91-7/91

Consultant: MGT of America, Inc.

Estimated savings from TSPR recommendations: \$13,000

Rec #	Recommendations	Implementation Status	Comments
Community Involvement			
R.1	Increase citizen attendance and participation in school board meetings.	Modified	Teachers now are being allowed to attend school-board meetings.
R.2	Involve more parents in the Parent-Teacher Council (PTC).	Modified	The district is using word of mouth to get more parents attending PTC. Sending notes home with children did not prove successful.
175 R.3	Prepare and circulate a brochure with key district facts and figures, including pertinent information abstracted from TEA's <i>Annual Performance Report</i> .	Not Implemented	
R.4	Enlist a volunteer coordinator and increase the use of volunteers to assist classroom teachers.	Modified	No volunteer coordinator has been enlisted, but the superintendent has set a goal of increasing the number of volunteers each year. He personally asks parents for their assistance, and has recruited volunteer substitute teachers.
District Organization and Management			
R.5	Due to the district's small size, eliminate the high school principal's position and transfer these duties to the superintendent.	Not Implemented	This year, the high school principal became superintendent, but the district hired another principal to replace him. A small savings was experienced, since the new principal is required to teach one class.
R.6	Offer all employees at least a partially district-funded health insurance program.	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
R.7	Provide insurance for student athletes.	Intact	Athletic insurance has been offered to students for a number of years.
R.8	Reconcile differences between financial figures reported in the independent auditor's report and those in TEA's <i>Annual Performance Report</i> .	Intact	For the first time this year, the district has asked an external accountant to help reconcile the books at the end of the year.
R.9	Use the district's independent auditor's report as the basis for beginning balances in the annual budget.	Intact	This will be done for the first time this year.

Personnel Management and Development

R.10	Develop and provide all employees with a personnel policies and procedures handbook.	Not Implemented	The district is considering this proposal.
R.11	Develop an action plan to reduce turnover rates for teachers and coaches.	Not Implemented	The district is considering this proposal.

Education Support Programs and Services

R.12	Contract with the regional education service center for a computerized student attendance and grading system. Additional costs to the district would be insignificant compared to the cost of the time and paperwork currently needed to maintain the manual system.	Modified	The district has contracted with the regional education service center for computerized attendance, but not grading.
R.13	Update and improve the District/Campus Improvement Plan to serve as the basis for the evaluation of instructional programs.	Intact	The District/Campus Improvement Plan has been updated.
R.14	Make the library available to students and teachers all day.	Intact	Done.
R.15	Immediately employ a part-time guidance counselor.	Intact	The district is actively seeking a part-time guidance counselor.

Rec #	Recommendations	Implementation Status	Comments
Educational Delivery and Curriculum and Instructional Services			
R.16	Expand the vocational program to include job-preparatory courses; initiate a gifted and talented program for students.	Modified	The district has not yet included job-preparatory courses. This year, the district will offer a gifted and talented program.
R.17	Institute a Limited English Proficiency/English As a Second Language (LEP/ESL) program.	Not Implemented	Not implemented because the district has no students requiring it.
R.18	Provide students with additional opportunities for computer education.	Intact	A computer lab costing between \$30,000 and \$40,000 was completed last year.
Administrative/Operational Services			
R.19	Develop administrative procedures manuals for the district's maintenance, food services and transportation functions.	Intact	Not fully implemented yet. The district will work on a manual for food services this year.
R.20	Eliminate the current operating deficit in the district's food services operation.	Intact	The district is examining its food service area, but has not yet found a way to decrease the deficit.
R.21	Provide in-service training for district cooks.	Modified	Some in-service training has been given to cooks this year.
R.22	Develop and follow preventive maintenance schedules for all district facilities and equipment.	Modified	Although the district does not have a formal preventative maintenance plan, they have an extensive array of maintenance contracts.
R.23	Discontinue the practice of having bus drivers pay their own substitutes.	Intact	This practice has been discontinued.
R.24	Reduce per-pupil transportation costs, which are nearly four times greater than the average for districts in the region.	Not Implemented	The district disagrees with this assessment, and believes its transportation costs are high because its routes are spread over a large geographical area and serve a relatively small number of children.

San Antonio ISD

Period of TSPR review: 5/91-7/91

Consultant: MGT of America, Inc.

Estimated savings from TSPR recommendations: \$9,383,000

Rec #	Recommendations	Implementation Status	Comments
Community Involvement			
SA.1	Determine the reasons for a lack of community support of SAISD.	Not Implemented	
SA.2	Replace paid workers who sell tickets and monitor the stadium during athletic events with volunteers.	Not Implemented	SAISD disagreed with this recommendation, stating that paid workers are more accountable than volunteers.
SA.3	Implement a school volunteer program with a paid district-wide coordinator and school-level volunteer coordinators at each campus.	Intact	Done.
District Organization and Management			
SA.4	Contract with TASB to maintain the district's policy manual.	Intact	Done.
SA.5	Contract with TASB to develop and maintain an administrative procedures manual.	Not Implemented	
SA.6	Designate a central office to review and classify all administrative procedures prior to their issuance.	Not Implemented	
SA.7	Index board minutes for easy reference and retrieval.	Intact	SAISD has completed its indexing through 1972, and plans to continue the process all the way back to 1903.
SA.8	Conduct regular workshops for board members on their authority and responsibilities.	Intact	Done.

Rec #	Recommendations	Implementation Status	Comments
SA.9	Implement a plan, including appropriate training, to facilitate the district's move toward site-based management.	Intact	Development and implementation of this plan and appropriate training are under way.
SA.10	Implement a work-management system to improve the effectiveness of district operations and employees.	Not Implemented	
SA.11	Stop holding principals' meetings during the regular school day.	Modified	The district is attempting to avoid holding these meetings during the regular school day.
SA.12	Place district services and allocations of funds and personnel in individual school budgets.	Intact	Done.
SA.13	Discontinue the practice of rotating large numbers of principals each year.	Modified	The district is attempting do this.
SA.14	Develop a budgeting process that directly relates budget levels to workload measurements.	Not Implemented	The district agrees with the recommendation but has not begun implementation.
SA.15	Significantly strengthen planning procedures by assigning responsibility for preparing a district-wide strategic plan to a top-level administrator.	Intact	The district has strengthened its strategic planning procedures by assigning this responsibility to the associate superintendent for Instructional Services and the director of Management Support and Professional Development Services.
SA.16	Pursue current plans to seek alternate ways of dealing with tax delinquencies.	Intact	The district has hired a law firm to deal with tax delinquencies.
SA.17	Develop better-written documentation of financial management and internal control procedures.	Intact	Done.
SA.18	Increase the charges for employees' dependent coverage or decrease benefits to better reflect actual costs.	Modified	
SA.19	Increase the dollar level of contracts that can be signed by the district without board approval from \$5,000 to \$10,000.	Intact	Done. The district is considering raising the limit to \$25,000 to reflect recent statutory changes.

Rec #	Recommendations	Implementation Status	Comments
SA.20	Conduct a detailed review of district purchasing contracts.	Intact	The school district is conducting this review and participates with area local governments and the regional education service center in cooperative purchasing. For instance, SAISD purchases gasoline through a cooperative arrangement with the City of San Antonio.
SA.21	Conduct cost-effectiveness analyses as a basis for all bid specifications.	Intact	Done.
SA.22	Hold periodic meetings with contractors to determine whether current bid procedures prevent contractors from bidding their lowest prices.	Intact	These meetings now are being held.
SA.23	To the extent possible, avoid specifying brand names in bid specifications.	Intact	Done.
SA.24	Give bidders ample time and adequate information to study bid specifications.	Intact	Done.
SA.25	Develop in-service education opportunities to explain the use of the district's database management system.	Not Implemented	
SA.26	Consolidate and formalize the Management Information Services (MIS) function within a single administrative unit.	Not Implemented	
SA.27	Implement standards for microcomputer hardware and software purchases.	Intact	Done.
SA.28	Develop a formula that includes school size for determining MIS staffing.	Not Implemented	
SA.29	Develop a concise job description for personnel conducting school-based data functions.	Intact	Done.
SA.30	Require principals to take a more active interest in school-level data collection.	Modified	This process is under way.

Rec #	Recommendations	Implementation Status	Comments
SA.31	Expand the internal audit function to include management, MIS and operational units.	Intact	Done.
SA.32	Update the district school accounting manual more frequently than every 12 years.	Intact	The school district has updated its accounting manual for schools and plans to review it on an annual basis.
Personnel Management and Development			
SA.33	Develop an administrative procedures handbook and employee handbooks for all employees.	Intact	The district has developed an administrative procedures handbook and a employee handbook for classified employees only; administrative procedures handbooks for all employees will be developed in the future.
SA.34	Annually approve the service record of employees.	Intact	Done.
SA.35	Maintain in-service and staff-development records in employees' personnel files.	Not Implemented	
SA.36	Link the computer systems of the personnel department and staff development office to avoid duplication.	Not Implemented	
SA.37	Conduct a classification systems analysis of all positions.	Intact	This analysis is under way.
SA.38	Place the staff-development office under the associate superintendent for Personnel Services.	Not Implemented	
SA.39	Move the staff-development library to a location more accessible to school-level personnel.	Not Implemented	
SA.40	Formalize the planning of staff-development activities in all departments and schools, using the model action plan of the plant services department.	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
SA.41	Do not hold staff-development activities for principals and teachers while school is in session.	Modified	The school district is attempting to move staff-development activities for principals and teachers out of the school day. However, staff development will be driven by site-based decision making and conducting activities outside of the school day may not always be possible.
SA.42	Allocate staff development funds to schools for in-service training under the school-based management plan.	Intact	Done.
SA.43	Develop a board policy and administrative procedures for the evaluation of all personnel.	Intact	Done.
SA.44	Train all administrative and supervisory personnel in the proper use of evaluation systems.	Intact	Done.
SA.45	Use the results of individual appraisals to determine staff development needs.	Not Implemented	
SA.46	Review job descriptions for consistency with the district's compensation plan.	Intact	The school district has updated its compensation structure and established a compensation planning and design committee to continue monitoring compensation and job classifications. A local company, Valero, provided an employee to assist the district in this task.
SA.47	Make results from the Texas Teachers Appraisal System (TTAS) a factor in teacher termination or dismissal.	Intact	The school district is working with its employees to develop a new instrument other than TTAS for teacher performance assessment. Formal procedures have been put in place to begin this process. A greater linkage between the TTAS and teacher termination or dismissal may become a part of the new assessment system.
Educational Support Programs and Services			
SA.48	Develop an operational plan to evaluate programs on a periodic basis; add two evaluator positions.	Intact	Done.

Rec #	Recommendations	Implementation Status	Comments
SA.49	Ensure that grants contain an evaluation component that is reviewed, approved and implemented by the evaluation office.	Modified	The district has begun working on this recommendation.
SA.50	Require that student records and files be kept in a restricted area of each school.	Intact	Done.
SA.51	Develop a policy for counseling services with expectations clearly outlined.	Intact	Done.
SA.52	Develop comprehensive job descriptions for counselor positions.	Intact	
SA.53	Communicate the role and function of school counselors to teachers, parents and students.	Not Implemented	
SA.54	Coordinate the functions of counselors, diagnosticians, psychologists and social workers.	Intact	This process is under way.
SA.55	Provide 30 minutes each day for counseling advisory periods on secondary campuses.	Not Implemented	
SA.56	Provide counselors with clerical assistance to reduce their paperwork.	Intact	Done.
SA.57	Ensure that each elementary school has a full-time counselor.	Intact	Done.
SA.58	Substitute trained volunteers for paid health aides and eliminate nurse coordinator positions.	Not Implemented	
SA.59	Develop a consistent and detailed school discipline management plan for each campus.	Intact	Done.
SA.60	Develop district-wide guidelines for maintaining accurate and consistent records of disciplinary actions.	Not Implemented	Done.
SA.61	Strengthen disciplinary techniques and practices through parent education and parent involvement activities.	Intact	The district has begun working on this recommendation.

Rec #	Recommendations	Implementation Status	Comments
SA.62	Augment current guidelines for audiovisual equipment.	Not Implemented	
SA.63	Centralize the process for procuring library books to take advantage of bulk-rate discounts.	Intact	This was already being done.
SA.64	Ensure that clerical assistance is available to all librarians.	Intact	The district has begun working on this recommendation.
SA.65	Develop plans to promote greater collaboration between librarians and teachers.	Not Implemented	
SA.66	Collaborate with the San Antonio Public Library to provide students with access to its resources; initiate discussions with the library about establishing a branch library on a school site.	Intact	Done.
SA.67	Implement an automated textbook tracking system to reduce book losses.	Intact	All library books and high-school texts are being tracked. The district is preparing to track the remaining texts.
SA.68	Secure all surplus textbooks in locked rooms.	Intact	Done.
SA.69	Implement a more effective method of promoting student responsibility for textbooks.	Not Implemented	
Educational Delivery and Curriculum and Instructional Services			
SA.70	Use volunteers in the classroom.	Intact	The school district is using volunteers in the classroom but has not yet reduced its number of assistant teachers, who are needed to help with special education classes.
SA.71	Study SAISD's retention policy to determine whether it requires additional flexibility.	Intact	This study is under way.
SA.72	Analyze student outcome data to assess what happens to students who drop out of school.	Intact	This study is under way.

Rec #	Recommendations	Implementation Status	Comments
SA.73	Assess the effectiveness of alternative education programs.	Not Implemented.	
SA.74	Provide teachers with in-service training on strategies to improve the academic performance of at-risk students.	Intact	Done.
SA.75	Strengthen links with area social service agencies to assist at-risk students.	Intact	Done.
SA.76	Provide for a district-wide coordinator for the state compensatory education program.	Intact	Done.
SA.77	Develop a compensatory education plan with measurable goals and objectives.	Not Implemented	
SA.78	Implement evaluation strategies to assess the compensatory education program.	Not Implemented	
SA.79	Maximize district resources by making peer tutoring programs available at all middle and high schools.	Not Implemented	
SA.80	Evaluate language proficiency test data to track the performance of Limited English Proficiency (LEP) students.	Intact	Done.
SA.81	Review the process by which data are coded and used for generating the <i>Annual Performance Report</i> .	Intact	Done.
SA.82	Improve coordination among district staff responsible for the Chapter 1 program.	Intact	Done.
SA.83	Provide additional training to staff concerning federal and state reporting requirements.	Not Implemented	
SA.84	Implement more rigorous monitoring procedures for Chapter 1 student performance at the school level.	Intact	Done.
SA.85	Assess the impact of resource teachers on the gifted and talented program.	Intact	The district has begun this assessment.

Rec #	Recommendations	Implementation Status	Comments
SA.86	Improve communication between the district and secondary-level gifted and talented program teachers.	Intact	The district has begun working on this recommendation.
SA.87	Develop and implement a long-range plan for vocational education.	Intact	The district has begun working on this recommendation.
SA.88	Coordinate new course development in vocational education with the needs of local businesses, especially as they relate to basic skills.	Intact	Done.

Administrative/Operational Services

SA.89	Adopt an efficient and effective set of facility planning guidelines.	Not Implemented	
SA.90	Use these guidelines to evaluate each proposed facility project.	Not Implemented	
SA.91	Conduct a cost-comparison study to determine whether the consolidation of administrative and support functions into two or three sites would produce significant savings.	Not Implemented	This consolidation would require a new building that the district is not prepared to fund at present.
SA.92	Sell unused district land.	Intact	The district has placed some unused land on the market.
SA.93	Prepare and adopt a formal set of policies for the termination of non-teaching staff.	Intact	The district has begun working on this recommendation.
SA.94	Establish job-task time standards for all high-volume administrative and operational functions.	Not Implemented	
SA.95	Conduct a formal methods-improvement assessment of all administrative and operational functions.	Not Implemented	
SA.96	Expand the current energy monitoring program to include central energy consumption control.	Intact	The district has begun working on this recommendation.

Rec #	Recommendations	Implementation Status	Comments
SA.97	Establish a program to obtain ideas from employees about ways to reduce facilities maintenance and operations costs.	Not Implemented	
SA.98	Consider combining the repair, purchasing and textbook warehouses into a single building.	Modified	The school district studied the implications of this move and decided to purchase a third warehouse instead.
SA.99	Save money by selling the Boys' Club property.	Not Implemented	SAISD disagrees with this recommendation, stating that they have a need for the property.
SA.100	Monitor menus to make adjustments as necessary to take advantage of United States Department of Agriculture (USDA) commodity receipts.	Intact	Done. By implementing this recommendation, the district will receive an additional \$150,000 in free food from the federal government each year.
SA.101	Establish job-time task standards and a methods-improvement program for food service.	Not Implemented	
SA.102	Modify transportation procedures for deaf students.	Intact	The school district now requires that both drivers and assistants be certified to drive the bus. This reduces the need to hire substitute drivers in case of driver absences.
SA.103	Establish specific policies regarding the assignment of vehicles to each craft shop.	Not Implemented	
SA.104	Install a personal computer in the automotive shop to automate the preparation of work orders.	Modified	A computer has been installed and is used for record keeping, but work orders have not been automated.
SA.105	Explore the savings that can be achieved by purchasing vehicles in cooperation with the state General Purchasing Commission rather than through separate bids.	Intact	The school district already has done this and will continue to do so.
SA.106	Transfer the responsibility for maintaining the district's electronic security systems and door locks to the physical plant division.	Not Implemented	Due to the failure of a bond issue, the district was unable to implement this recommendation, but hopes to do so in the future.
SA.107	Install a single master-lock system for doors in district buildings.	Intact	The district has begun installing a single master-lock system throughout the district.

San Saba ISD

Period of TSPR review: 5/91-7/91

Consultant: MGT of America, Inc.

Estimated savings from TSPR recommendations: \$193,000

Rec #	Recommendations	Implementation Status	Comments
Community Involvement			
SS.1	Develop a public relations program to address feelings of alienation and inequity perceived by some members of the community.	Modified	According to the superintendent, much of this problem involved one physical education teacher who has been moved.
SS.2	Improve citizen input into district operations and increase citizen participation in school-board meetings.	Not Implemented	The district disagrees with this, citing a good deal of "hands-on" citizen activities already going on in small communities. The superintendent feels that he must be selective in asking for support.
SS.3	Prepare and circulate a brochure with key facts and figures on the district, including pertinent information abstracted from TEA's <i>Annual Performance Report</i> .	Intact	A brochure is currently being developed by the assistant superintendent. The district feels that TEA should establish a format into which districts can simply plug numbers, since not all districts have publishing capabilities.
SS.4	Identify a volunteer coordinator and increase the use of volunteers to assist classroom teachers.	Intact	A volunteer coordinator has been enlisted, but is just getting started. The coordinator is expected to provide some relief for the superintendent, who previously recruited and coordinated volunteers himself.
District Organization and Management			
SS.5	Provide board amendments to the budget at the functional level, not the category level.	Not Implemented	The Region 20 education service center performs these accounting functions for the district. The district has explored the possibility of making this change, but found that the service center's current computer program does not have this capability.

Rec #	Recommendations	Implementation Status	Comments
SS.6	Increase district collections of delinquent taxes.	Intact	The district has hired a firm to help them collect delinquent taxes. Also, they have stopped taxing personal property, which accounted for most delinquencies.
SS.7	Require the assistant to the superintendent to approve encumbrances of funds for purchase orders before issuing the orders.	Not Implemented	The district is looking at this process more closely, but feels that requiring the superintendent's assistant to approve purchase orders is contrary to site-based management principles.
SS.8	Require the athletic director to report to the high school principal instead of directly to the superintendent.	Intact	The athletic director has always reported to the high school principal.
SS.9	Modify the organizational chart to indicate that teachers report to their respective principals.	Intact	The district has no organizational charts, but teachers do report to their principals.
SS.10	Reorganize district schools into an elementary and a secondary school, thus eliminating the middle-school principal's position.	Not Implemented	
SS.11	Implement a site-based management approach that would involve principals and teachers in planning and budget development.	Modified	An attempt has been made at implementation. Teachers were involved in cutting the budget.
SS.12	Reconcile differences between financial figures reported in the independent auditor's report and TEA's <i>Annual Performance Report</i> .	Not Implemented	
Personnel Management and Development			
SS.13	Develop and provide all employees with a personnel policies and procedures handbook.	Modified	The district policy handbook is in the library and all employees have access to it.
SS.14	Create a system allowing for greater involvement of principals and teachers in the selection of new teachers.	Intact	Principals interview prospective teachers and make recommendations to the superintendent. District teachers also interview potential candidates and provide feedback to their principals.

Rec #	Recommendations	Implementation Status	Comments
Educational Support Programs and Services			
SS.15	Combine the intermediate and middle school libraries, as recommended in TEA's latest accreditation report.	Not Implemented	Physical capacity makes this recommendation unworkable at this time.
SS.16	Annually update district and campus improvement plans, as required by TEA.	Intact	The district/campus improvement plan has been updated.
SS.17	Relieve the district's counselor of clerical, scheduling and other administrative responsibilities so that he can devote more time to personal counseling in grades K-8.	Intact	The district's counselor has been relieved of added duties.
SS.18	Establish a committee to examine the current dress code and its consistent implementation, and address concerns expressed by students and parents regarding the dress code.	Intact	A superintendent's council has been established; each campus has a representative on the council. Dress codes, among other issues, have been addressed.

191 **Educational Delivery and Curriculum and Instructional Services**

SS.19	Establish separate advisory committees or subcommittees for the district's various vocational education areas.	Not Implemented	
SS.20	Develop comprehensive plans for state compensatory and bilingual education programs that include measurable objectives for program evaluation.	Intact	A part-time English as a Second Language (ESL) teacher and part-time speech therapist have been hired. The district has purchased a computer program to aid in program evaluation.
SS.21	Examine the space used for the high school's in-school suspension program.	Intact	The high school's in-school suspension program has been moved to an another campus in a remote location.
SS.22	Examine the federal funding (Chapter 1) program to ensure that students with the greatest need are served first and the annual program evaluation is circulated to the appropriate parties.	Intact	This state-mandated change already was under way at the time of the review. The district has changed to a Content Mastery program.

Rec #	Recommendations	Implementation Status	Comments
Administrative/Operational Services			
SS.23.	Develop administrative procedures manuals, written job descriptions and annual written performance evaluations in the areas of maintenance, food services and transportation.	Not Implemented	The district has not completed this due to a personnel change last year. However, TSPR points out that one of the primary benefits of job descriptions and manuals is that they ensure continuity during personnel changes.
SS.24	Develop and follow preventive maintenance schedules for all district facilities and equipment.	Intact	The district has developed a preventative maintenance schedule.
SS.25	Increase the involvement of supervisors in the maintenance, food services and transportation areas in developing budgets; hold them accountable for adherence to their budgets.	Intact	The district is allowing supervisors more independence in this area.
SS.26	Reduce per-pupil transportation costs.	Intact	Per-pupil transportation costs are being reduced by purchasing vans and cars for extracurricular travel as well as for remote routes. The per mile cost of extracurricular travel has been cut from approximately \$1 per mile to 27 cents per mile as a result.
SS.27	Use long-range capital financing, rather than annual operating funds, to finance an addition to the elementary school.	Not Implemented	The district maintains that long-range capital financing is not acceptable to its taxpayers.
SS.28	Provide air conditioning to all classrooms and discontinue the practice of requiring teachers to pay for air conditioners if they want them in their classrooms.	Intact	Air conditioning is being provided to all classrooms.
SS.29	Immediately address the need for a new high school campus, to allow for the removal of high school classes from the intermediate school building.	Not Implemented	

San Saba Countywide

Period of TSPR review: 5/91-7/91

Consultant: MGT of America, Inc.

Estimated savings from TSPR recommendations: \$245,000

Rec #	Recommendations	Implementation Status	Comments
Transportation			
SSCW.1	Cherokee and Richland Springs ISDs should contract with San Saba ISD for all student transportation needs, including trips to athletic events and field trips.	Not Implemented	The San Saba ISD, Cherokee ISD and Richland Springs ISD superintendents disagree with TSPR's findings and feel that, due to the county's geographic size, no economies could be achieved by contracting with San Saba ISD for all student transportation needs.
Purchasing			
SSCW.2	One district should be designated as the purchasing agent for all three districts in San Saba County. All district purchases should be routed through the designated school district.	Not Implemented	The districts disagree with this recommendation because they feel the county's geographic size entails delivery and storage costs that would make the project's cost prohibitive. However, Cherokee has entered into a purchasing cooperative with Mason ISD; Richland Springs is exploring a similar plan. TSPR continues to support its original recommendation, and encourages these districts to work with each other or the Region 15 education service center in developing a bidding cooperative that would allow each district to place its own orders and have shipments delivered directly to the district.

Rec #	Recommendations	Implementation Status	Comments
Centralized Purchasing for Libraries and Instructional Materials			
SSCW.3	The Region 15 education service centers should plan to provide centralized purchasing services for libraries and instructional materials for all 45 school districts in its area.	Not Implemented	The Region 15 education service center is providing a degree of centralized purchasing for libraries and instructional materials. Delivery and storage costs were cited as making a greater degree of cooperative purchasing cost-prohibitive.
Shared Curriculum Delivery			
SSCW.4	San Saba County school districts should offer a consolidated vocational education/job preparatory program. San Saba ISD should serve as host district for vocational education. Students in Cherokee and Richland Springs ISDs who are not college-bound should be provided with transportation to allow them to participate in job preparatory courses already available in San Saba ISD. The three districts should pool federal, state and local vocational funds for this purpose.	Not Implemented	San Saba ISD, Cherokee ISD and Richland Springs ISD superintendents decided that such a move would not be cost-effective in view of the relatively high transportation costs involved in shuttling students among the districts. TSPR continues to believe that the benefits of offering vocational programs to all students in San Saba County would outweigh the shared program costs.
SSCW.5	The three school districts should consolidate state and local resources for their gifted and talented program and share educational services with San Saba ISD, which would serve as the host district.	Not Implemented	The districts tried to share resources at one time, but ended up splitting up again due to increased costs.
Guidance Counselors			
SSCW.6	The three school districts should pool instructional support resources and hire a full-time counselor. The new counselor should provide services to grades K-12 in Cherokee and Richland Springs ISD two days per week in each district, and one day per week in San Saba ISD.	Not Implemented	The districts have attempted to hire a counselor, but have not been able to find someone willing to travel between the schools.

Victoria ISD

Period of TSPR review: 5/91-7/91

Consultant: Deloitte & Touche

Estimated savings from TSPR recommendations: \$124,000

Rec #	Recommendations	Implementation Status	Comments
Accounting			
V.1	Implement a new payroll system featuring direct deposit for employee salaries, on-line employee attendance reporting, maintenance of employee pay histories, automated payroll adjustment capabilities, an expanded number of deductions and accrual of vacation and sick leave.	Intact	<p>Victoria ISD implemented a new system on September 1, 1992, which expanded the number of deductions, taxes and pretax deductions that could be made. VISD is implementing features for direct deposit for employee earnings and accrual of vacations and sick leave.</p> <p>However, the district does not plan to institute true on-line employee attendance reporting by campus location. As an alternative, campuses will be able to submit attendance reporting forms via the system.</p>
V.2	Implement a district-wide risk management program including comprehensive safety policies, training and proof-of-insurance requirements for employees using personal vehicles on district business and campus safety committees. Consider implementing a "lockdown" program for district valuables.	Intact	<p>VISD completed a risk management manual in March 1992 that included procedures regarding natural and man-made disasters, and worker's compensation loss control. In addition, the district Maintenance Department has instituted monthly checks of all district facilities to identify and report unsafe conditions or maintenance needs. Several times a year, a loss-control specialist from the district's worker's compensation administrator visits the district and examines all facilities. While in the district, this specialist meets with each campus's safety coordinator and reviews loss-control efforts at that site.</p>

Rec #	Recommendations	Implementation Status	Comments
V.3	Centralize control of the district's vending-machine operations.	Modified	VISD maintains that centralized control from the business office is not possible at present due to a lack of personnel. Generally, each principal controls vending operations on his or her campus. Centralized purchasing of vending-machine drinks and snacks is in progress.
V.4	Modify management processes and procedures to accomplish the following goals: <ul style="list-style-type: none"> - Same-day deposit of daily tax receipts - A comprehensive policies and procedures manual for all accounting functions - Centralized control of school sundry funds through the central accounting system - Increased internal controls over check stock 	Intact	The following features have been put into place: <ul style="list-style-type: none"> - Daily deposit of tax receipts - A payroll policy and procedures manual - All district check stock kept in the district vault, with all stock accounted for as used; Unused stock is boxed until needed - Automated print-shop and central supply accounting <p>Policy and procedures manuals for finance functions will be developed when the new computer system is fully implemented at campus level. Centralized control of school sundry funds has been discussed, but not yet implemented.</p>

Curriculum and Instruction

V.5	Implement methods for effective program and process evaluations to assess the district's curricular and instructional programs and service delivery.	Intact	VISD has approved a 22-step process for a three-year cycle of evaluation for all regular and special programs. Fourteen programs have been identified for the first year's reviews. Program descriptions, goals and an evaluation methodology are being developed for these reviews. The process eventually will be used to evaluate all existing programs, to determine which ones need modifications and which are not accomplishing their goals.
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Rec #	Recommendations	Implementation Status	Comments
V.6	Modify the curriculum development and revision process to coordinate special education and the general curriculum. Develop a formal curriculum review and revision process to ensure that the curriculum meets student and teacher needs.	Intact	Special education and bilingual program teachers now are being included on curriculum development teams.
V.7	Implement improvements in the district's current organizational structure. Move textbook, attendance, student accounting and nursing and health services from the Special Services and Instruction Departments to the coordinator of Student Services. Reduce the span of control of the director of Special Programs.	Modified	Day-to-day responsibilities for textbooks, attendance and student accounting have been delegated to non-managerial staff. VISD has reduced the director of Special Programs' span of control by removing special education from that responsibility.
V.8	Design and implement additional staff development programs to meet the needs of non-teaching employees.	Intact	Phase I training for bus drivers has been conducted and is planned for lunchroom monitors. In addition, the district is conducting ongoing staff development for administrators, counselors, diagnosticians and librarians.
197	Maintenance		
V.9	Reduce custodial staff levels by revising staffing methodologies, changing scheduling practices and altering the district's mix of full-time versus part-time staff.	Intact	At present, the district is changing over to a staffing methodology modeled on Texas A&M's. VISD also is beginning to replace full-time positions with two half-time positions.
V.10	Seek input from the Maintenance Department on construction and renovation projects.	Intact	Maintenance now has input in the selection of materials and dispensers.
Data Processing			
V.11	Initiate a strategic planning process for the district's information systems.	Intact	<p data-bbox="1371 1219 1969 1342">Most of VISD's objectives have been defined and implemented with the new data processing system. The strategic plan for information systems includes:</p> <ul data-bbox="1419 1390 1969 1482" style="list-style-type: none"> - development of a high-level functional model of the district's major functions, processes and activities.

Rec #	Recommendations	Implementation Status	Comments
V.12	Establish formal policies and procedures to coordinate the acquisition of computer hardware and software and telecommunications equipment.	Intact	<ul style="list-style-type: none"> - review of existing hardware platforms and software packages. - an assessment of automated support needs and requirements. - formulation of long-term district objectives, strategies and implementation plans concerning information technology. - development of a disaster recovery plan for data processing. <p>Done.</p>
V.13	Develop a formal agreement with the Region 3 education service center to define specific performance requirements for the district's data processing.	Not Implemented	This recommendation no longer applies, since all data processing has been taken in-house.
Food Service			
V.14	Require the Food Service Department to reinforce sound fiduciary responsibility at all levels of the organization. Incorporate financial goals into each manager's performance objectives.	Intact	<p>The Food Service department has installed an automated food service system that will generate daily financial performance reports for the central Food Service management office as well as each site.</p> <p>The Food Service Department has implemented two features of the new software system. The first was eligibility determination, which allowed the district to keep records on all students who have applied for the federal lunch program. Second was a point-of-sale system. To date, seven district schools have point-of-sale systems allowing the district to track revenue and meal accountability on a daily basis.</p>

Rec #	Recommendations	Implementation Status	Comments
V.15	Analyze labor costs and labor intensity involved in current food preparation methods. Balance the use of prepared foods with scratch cooking to enhance profitability.	Not Implemented	<p>Inventory controls have been installed at the central Food Service office as well as each site. Costs affiliated with ordering are tracked from the central Food Service office. Profit-and-loss statements are generated and compared to determine the operation's effectiveness.</p> <p>Vendor bidding at the central Food Service office also will become automated with the new software system. Historical data on all products will allow the district to determine if the district is meeting or exceeding costs.</p> <p>Menu planning and food production systems will be initiated after the inventory control system is in place. These systems will allow for the tracking of costs associated with daily menu selections.</p>
V.16	Adjust food service staffing requirements through more economical food preparation methods and improved staff scheduling.	Intact	<p>VISD disagrees with TSPR's recommendation to balance scratch cooking with heat-and-serve products. The food service department currently provides a wide variety of both types of these products, and this mixture has proven to be an asset to the district; student participation in school lunch service has more than doubled in recent years.</p> <p>The district has reviewed food service staffing but has not yet made any reductions. This is primarily due to a 15-percent increase in student participation during the 1991-92 school year.</p>

Rec #	Recommendations	Implementation Status	Comments
V.17	Develop an equipment replacement program.	Intact	The district has updated its large equipment inventory file at each campus, and plans to attach a metal tag with a serial number to all large equipment for identification purposes. This serial number will correspond to data such as the date of purchase, cost, a description of the equipment, brand, supplier, location and maintenance repairs and costs.
Human Resources			
V.18	Develop and implement a human resources information system that features position control with interface to the budget system, employee histories, application tracking, performance appraisal and grievance monitoring and salary and benefits administration.	Modified	Performance appraisal monitoring is in place. Position control with interface to the budget system will begin in January 1994, as will application tracking, screening and correspondence functions. Maintenance of employee history for trends and historical analysis will start immediately. Salary administration will generate budget reports and projections will be available through the new system. The system also will contain a benefits screen that will better manage the benefits package. VISD has no immediate plans to monitor grievances.
V.19	Develop formal job classification and evaluation and salary administration programs, including complete and accurate job descriptions for all positions.	Intact	The Texas Association of School Boards (TASB) performed a study of the district's job descriptions several years ago. While most district jobs have descriptions, VISD has begun examining new positions added since the TASB study and updating old descriptions.

Rec #	Recommendations	Implementation Status	Comments
V.20	<p>Improve human resources policies and procedures to include:</p> <ul style="list-style-type: none"> - more efficient use of recruiting resources. - a training program for the performance appraisal system. - a district-wide compensation policy. - training for employees participating in the recruitment process. - initial screening by the Personnel Department of applications for various support positions. - revised employment applications for non-certified positions. 	Modified	<p>VISD works with the Victoria Chamber of Commerce to produce brochures and films that publicize Victoria. Principals join in recruitment efforts at colleges and universities. The district holds an annual training program to update its performance appraisal techniques. Each year, the district conducts a salary study of similarly sized districts; VISD's current four-year salary plan is above average in all categories. Each principal and all central office staff involved in recruitment are skilled in SRI interviewing techniques. This year, the district revised its applications for professional, paraprofessional, substitute, transportation and food-service positions.</p> <p>The district recognizes a need for further training for principals and recruiters to bring the district up to date, particularly in light of the Americans with Disabilities Act.</p> <p>However, VISD maintains that using district personnel staff to screen applicants for food services, transportation and maintenance would require an increase in clerical staff and twice as much interviewing time. In addition, if these records were moved into the Personnel Department, considerable space would be required to house them.</p>

Rec #	Recommendations	Implementation Status	Comments
Maintenance			
V.21	Implement a maintenance management information system.	Intact	VISD has modified its work orders to include data useful to management, including costs for labor, materials, equipment and other items associated with specific maintenance activities. The new work orders also include summaries of maintenance work times; maintenance activity by craft (such as plumbing, painting, carpentry); maintenance activity by type (routine or non-routine); a priority rating, and copies of a principal's request supporting the work order.
V.22	Develop a comprehensive preventive maintenance plan for facilities and equipment to define preventative maintenance requirements and timing, responsibility assignments and performance monitoring and quality assurance.	Not Implemented	VISD disagrees with TSPR's findings, feeling its current preventative maintenance program is adequate.
V.23	Develop standards, procedures, performance criteria and performance expectations for maintenance activities.	Intact	The district has developed a policy manual containing maintenance standards and procedures as well as procedures for helpers. In addition, the district provides cross-training for employees in other positions.
V.24	Develop a long-term facilities master plan and accompanying capital improvements plan.	Modified	VISD's construction superintendent and other staff have developed a facility information report on all campuses. However, the district board has not yet decided to employ an architect to prepare a formal master plan.
V.25	Assess the cost-effectiveness of district trash collection, cabinet building, furniture repair and welding services compared to similar, externally available services.	Modified	VISD checked prices for trash collection with two companies. One would not quote a price, while the other stated that costs to serve the district would range between \$75,000 and \$80,000 annually—more than the district currently spends. The district has not performed a similar price comparison for the other services mentioned.

Rec #	Recommendations	Implementation Status	Comments
V.26	Adjust maintenance staffing requirements based on maintenance standards and criteria and the availability of more cost-effective external services.	Not Implemented	
V.27	In conjunction with the district's current energy management program, expand training opportunities for VISD staff in proper energy management.	Intact	The district sends staff to free sessions provided by the governor's office and trains staff in-house at no cost. Free training and consulting services are provided by Central Power and Light and the Governor's Office.

Purchasing and Central Supply Warehouse

V.28	Develop and implement an automated purchasing system. The following features should be considered:	Intact	VISD is implementing this system.
	<ul style="list-style-type: none"> - On-line requisition capability - On-line approval and control - An item master file - Account code security - Request for quote capability - Vendor performance tracking - Masking of account code structure to minimize data entry - A means of monitoring requisition "splitting," as well as sequential and cumulative purchasing 		Training to implement on-line requisitions and on-line approval and control has been scheduled. A few features, such as quote capability, vendor performance tracking and the monitoring of cumulative purchases, are planned for implementation during 1993.

Rec #	Recommendations	Implementation Status	Comments
V.29	Develop a continual process to analyze and plan for space requirements in district warehouse facilities.	Intact	The district has added three-tier racking, security fences, mirrors, ladders, a service bell and telephones to its warehouse. Moreover, the district has improved its usage of the loading dock and moved the warehouse office area for better management and supervision. Order processing and shipment are now accomplished within 48 hours in most cases.
V.30	Develop and implement an inventory information system featuring an item-locator system, a back-order system for out-of-stock items and an interface between an electronic inventory system and a fixed-asset system.	Intact	<p data-bbox="1373 502 1980 667">VISD has implemented an item-locator system in its computerized warehouse files. Locations, racks, and sections are now marked accordingly. The district's new data-processing system incorporates a back-order feature for stock items.</p> <p data-bbox="1373 715 1980 981">The interface between the inventory and fixed-asset systems has not yet been implemented. The new data system incorporates a fixed-asset control file that will be loaded in the near future. A new fixed-asset report is being prepared for acquisitions. VISD has scheduled annual physical inventories of fixed assets that will be reconciled with book inventories by the Business Office.</p>

Rec #	Recommendations	Implementation Status	Comments
V.31	Develop and implement training programs related to Texas bidding law for appropriate district personnel. Develop specific criteria for vendors to be included on the VISD-approved vendor list. Develop a streamlined approval process for requisitions.	Intact	<p>Procedures are in place to have campuses and departments identify major purchases at the beginning of each school year. The purchasing function has been reorganized as a function of Central Supply and warehousing operations. Requisitions have been eliminated; purchase orders now are prepared at the campus/department level with approval from an assistant superintendent. The district's purchasing coordinator has attended a Texas Association of School Business Officials (TASBO) training session. New handbooks on enhancing purchasing practices have been obtained from TEA and TASBO. A number of useful policies and bid specification packages have been obtained from other districts. The purchasing coordinator regularly attends meetings of the Association of Purchasing Managers. The district regularly consults with TEA, TASBO and TASB staff on purchasing matters.</p> <p>VISD also has revised criteria used to develop its vendor list. Streamlining of the approval process for requisitions will be completed when the new central administration data-processing system is fully implemented. The system features electronic processing of requisitions from the campus/department level with electronic approval features.</p>
School Management			
V.32	Assess alternatives for improving the district's utilization of existing school facilities.	Not Implemented	VISD maintains that the analysis of school building capacity TSPR used in preparing this recommendation is outdated.
V.33	Develop staffing formulas for clerical personnel.	Not Implemented	

Rec #	Recommendations	Implementation Status	Comments
V.34	Develop a written site-based management plan, including implementation strategies and schedules.	Intact	VISD has written and submitted a plan to the state commissioner of education and now is reviewing its implementation status to identify problems, successes and failures. Full implementation of site-based management is expected by September 1, 1994.
V.35	Require the coordinator of Assessment and Evaluation to develop performance evaluation methodologies and tools to assess the educational effectiveness of VISD's campus-based programs.	Intact	This year, the curriculum department developed a comprehensive assessment process for VISD. Fifteen programs and processes will be evaluated on a three-year cycle. The district is still attempting to improve its integration of performance assessments with curriculum and program planning.
V.36	Develop a program to identify and train current employees to become principals.	Intact	Several administrators and assistant principals are participating in the Region 3 education service center's Principal's Academy. In 1992-93, the director of Staff Development provided regular staff development courses for assistant principals.
Transportation			
V.37	Analyze bus routes to determine if consolidation of routes would result in more efficient operations and cost savings. The routing analysis should consider bell schedules, special routes and identify service levels.	Intact	The district reviewed its routes and found little in the way of opportunities for streamlining, given the district's geographic size, the location of campuses, the sparse rural population and the fact that several routes already begin picking students up as early as 6:10 a.m. Urban routes are near capacity and tightly scheduled.
V.38	Carefully review the existing workloads of district mechanics, including duties and tasks performed; average production work hours over a specified time period; work-order backlogs, and average job-completion times as compared to established automotive repair standards. Consider eliminating one full-time mechanic position.	Modified	This review is under way. No positions have been eliminated.

Rec #	Recommendations	Implementation Status	Comments
V.39	Develop an equipment replacement program based on the age of the vehicle, mileage and historical repair costs.	Intact	VISD evaluates the reliability and utility of older vehicles each time they need any major repairs. Considerations such as repair and replacement cost and salvage value all influence the decision of whether or not to continue active use of a given unit.
V.40	Revise the district's methodology for computing costs associated with extracurricular trips in excess of 51 miles. The methodology should reflect all direct and indirect transportation costs.	Intact	The district now records the exact number of miles driven and driving and waiting times and charges the sponsoring group accordingly.
Governance			
V.41	Develop consensus among the district's administration and board concerning all aspects of the district's operations before developing the comprehensive strategic plan.	Intact	Done.
V.42	The VISD board should resolve to abide by applicable laws, regulations and board policies related to the involvement of the board members in the district's day-to-day operations.	Intact	The district has made efforts to clarify board roles and responsibilities through numerous training and goal-setting sessions.
V.43	Improve the district's mechanisms for supplying information to support the board's decision-making.	Intact	The district's present agenda background information includes an overview of the recommended approach and a contact person for additional information. The district is considering including discussions of alternatives and cost/benefit analyses for each item. This should provide the board with better information but would consume a greater amount of management time.

Rec #	Recommendations	Implementation Status	Comments
Planning			
V.44	Broaden the scope of the current strategic planning process to incorporate plans for all aspects of the district's operations.	Intact	<p>VISD's strategic planning process has incorporated long-range planning in the following operational areas:</p> <ul style="list-style-type: none"> - Facility needs - Technology - Food Services - Salary structures and job worth - Job accountabilities - Procedures and regulations - Energy management - Asbestos management - Risk management - ADA section 504 plan
V.45	Use the planning process to develop strategic consensus among the district's Board of Trustees.	Intact	
Budgeting			
V.46	Develop and implement an automated budgeting system.	Intact	<p>New finance and budget software has been purchased and installed. This software will allow all recommended functions to be accomplished. All features are on-line and ready pending training and the onset of the 1993-94 budget cycle.</p>

Rec #	Recommendations	Implementation Status	Comments
V.47	Provide updated and detailed policies and procedures concerning the budget development process and budget administration, and distribute these policies and procedures to all managers with budget responsibilities. Provide adequate training related to the budget development process.	Intact	These policies and procedures will be updated to reflect the requirements and capabilities of the new budget system.
V.48	Develop a multi-year budget forecast.	Intact	Multi-year budget forecasts are being developed.
V.49	Revise VISD's monthly budget reporting format to compare actual revenue and expenditures with the original budget as well as the most recent quarterly forecast. The report should supply data on a monthly and year-to-date basis, with related variances.	Intact	Monthly reports have always provided annual budget, year-to-date, month-to-date and unencumbered amounts, along with a percentage of expenditure. Limitations of the software package have prevented much flexibility beyond basic reports. New software has been installed and financial data is being recorded for future reports. The conversion process has put a significant strain on all business-office operations, and the district is behind in many essential but non-critical areas. Once this backlog has been cleared, the new system's report-generating capabilities will be implemented.

209

Performance Appraisal

V.50	<p>Change the overall district-wide performance appraisal process as follows.</p> <ul style="list-style-type: none"> - Modify the district's performance appraisal instruments using a "job-family" approach. - Implement a teacher appraisal process that includes at least one unscheduled observation as part of each annual teacher appraisal. - Institute an annual user training program for the performance appraisal system - Develop a method for compiling and analyzing performance appraisal data. 	Modified	VISD has hired a consultant to conduct a job-worth study as a preliminary step toward development of a job-family approach.
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Rec #	Recommendations	Implementation Status	Comments
V.51	Examine district-wide performance appraisal processes including performance rating trends, rating criteria, the usefulness of each appraisal document, rating tendencies and comparative rating criteria stratified by organizational unit or campus.	Not Implemented	VISD maintains that this recommendation would require an excessive commitment of staff time and has declined to implement it.

Organization, Staffing and Compensation

V.52	Improve the district's current organizational structure. Move textbook, attendance, student accounting and nursing and health services from the Special Services and Instruction Departments to the coordinator of Student Services. Reduce the span of control of the director of Special Programs.	Modified	Day-to-day responsibility for textbooks, attendance and student accounting have been delegated to non-managerial staff. VISD has reduced the director of Special Programs' span of control by removing special education from that responsibility.
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V.53	Develop formal job classification/evaluation and salary administration programs for the district, including complete and accurate job descriptions for all positions.	Intact	The Texas Association of School Boards (TASB) performed a study of the district's job descriptions several years ago. While most district jobs have descriptions, VISD has begun examining new positions added since the TASB study and updating old descriptions.
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Innovative Programs

V.54	In conjunction with TSPR's management audits of Texas school districts, identify opportunities to share VISD program innovations with the management and staff of other school districts. Monitor audit findings to identify innovations in other districts that could be useful in VISD.	Intact	VISD has shared information on its staff-development programs with other districts and is willing to assist other districts in establishing similar programs.
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West Orange-Cove CISD

Period of TSPR review: 5/91-7/91

Consultant: KPMG Peat Marwick

Estimated savings from TSPR recommendations: \$476,000

Rec #	Description	Implementation Status	Comments
Non-Instructional Staffing			
W.1	Reduce central-office instructional administrator positions from eight positions to no more than five.	Intact	Four central-office administrator positions have been eliminated and a fifth position has been transferred to a campus on a loan basis. A decision to permanently retain, move or transfer the fifth position has not yet been made.
W.2	Eliminate four clerical positions in the business office.	Intact	Two and one-half clerical positions have been eliminated in the business office. Moreover, a re-assignment of responsibility has allowed an additional position to be eliminated.
W.3	The regional education service center should be encouraged to expand its services in the area of computer models used to determine the type of teaching and curriculum personnel needed in school districts.		This was a recommendation for the regional education service center and not West Orange-Cove CISD.
W.4	Centralize payroll records in the district payroll unit.	Intact	Payroll records have been physically moved into the district's payroll department, which is responsible for maintaining these records.

Rec #	Recommendations	Implementation Status	Comments
Transportation			
W.5	Reduce the number of buses maintained by the district.	Modified	The district recognized the need to upgrade its overall transportation system and concurred with TSPR's recommendations, but felt they lacked sufficient expertise to make the needed changes. Therefore, the district opted to privatize its transportation services. The contractor has supplied new buses, mechanics and management and training expertise not available within the district's organization. The company also agreed to hire and retrain the district's drivers. By privatizing, all of TSPR's recommendations were implemented and the district saved about \$200,000 annually. In addition, the district has retained the option to buy the new bus fleet through fixed payments over an 11-year period, should privatization prove to be undesirable.
W.6	Combine bus routes and place bus stops farther apart.	Modified	See above.
W.7	Hire a full-time trainer.	Modified	See above.
W.8	Hire one or two standby drivers.	Modified	See above.
W.9	Offer training to improve driver skills.	Modified	See above.
W.10	Establish a safety committee.	Modified	See above.
W.11	Log accidents and issue a report at least annually.	Modified	See above.
W.12	Adopt a policy for testing bus drivers for drug and alcohol use.	Modified	See above.
W.13	Review drivers' files for criminal offenses.	Modified	See above.
W.14	Purchase computer for maintaining route logs and transportation maintenance records.	Modified	See above.

Rec #	Recommendations	Implementation Status	Comments
W.15	Maintain ridership data for non-state-funded routes.	Modified	See above.
W.16	Log all early and late runs.	Modified	See above.
W.17	Track the number and causes of breakdowns.	Modified	See above.
W.18	Revise scheduling to reduce the incidence of extracurricular trips that conflict with regularly scheduled trips.	Modified	See above.
W.19	Develop inventory records of school-bus parts and supplies. This activity should be performed in conjunction with the development of fixed-asset accounting records.	Modified	See above.
W.20	Move or modify the transportation facility.	Modified	See above.
Payroll			
W.21	Install time clocks to accurately measure employee work hours.	Not Implemented	Supervisors for hourly employees are responsible for ensuring that their employees report to and leave work in a timely manner. The cost of nine time clocks (\$285 each) and time cards (\$40 per 1,000) appeared to offset any savings that might be realized. The district did not concur with TSPR's assumption that abuses and waste were equal to 5 percent of the payroll.
W.22	Update the payroll procedure manual.	Intact	The district is in the process of updating its office procedure manual to include specific payroll procedures. Before adopting new procedures, the district will field-test them to determine their merit. They feel that this update will eliminate confusion, reduce wasted time and help hold mistakes to a minimum.
W.23	Redistribute payroll duties to ensure that payroll and personnel functions remain accountable and that appropriate security controls are in place.	Intact	The district is reviewing duties related to its payroll department. The details of this reorganization should be completed in the current fiscal year.

Rec #	Recommendations	Implementation Status	Comments
Purchasing			
W.24	Develop a central purchasing department and hire a purchasing agent to manage it.	Intact	The district has assigned a purchasing agent to manage its purchasing department. This position's functions include the authorization of purchase orders; the selection of vendors through competitive bidding, informal price quotations and negotiations; development and maintenance of vendor, commodity and bid lists; development of bid specifications with advice from user departments, and ensuring that appropriate state laws controlling purchasing practices are followed.
W.25	Update the district's purchasing procedures manual.	Intact	An update of the purchasing portion of the office procedure manual is complete.
W.26	Develop an approved vendor list.	Intact	The district maintains that its approved vendor list is constantly changing. The purchasing agent is constantly adding and subtracting names from the list, but cautions that removing seldom-used vendors in specialty areas should be done with care. Some of these vendors are the sole source of a product or service, and removing them from the list may delay necessary repairs or replacements.
W.27	Develop purchasing strategies to reduce the district's number of small purchases and consolidate orders of similar, frequently purchased items.	Intact	The purchasing department has worked with each site to consolidate the purchase of like items from the same vendor. This has reduced the number of purchase orders under \$100 and increased the use of blanket purchase orders. This practice enables the district to prepare a single purchase order while allowing the campuses to make purchases as needed. The purchasing department bought and used an automated system for one year. However, the system was not sufficiently powerful to meet the district's needs; the district continues to explore this idea.

Rec #	Recommendations	Implementation Status	Comments
W.28	Establish purchase-order expiration dates, so that district accounting will not be complicated by long-outstanding orders.	Intact	The district still is considering this proposal.
W.29	Tighten district bidding procedures.	Intact	The district has tightened its bid process. Procedures have been developed by the purchasing department outlining steps and approvals required for the issuance of a bid. By tightening this process, the district estimates they will save \$150,000 annually.
W.30	Develop a bid checklist.	Modified	The district feels that an additional checklist, in addition to its revised procedures, is not necessary.
Athletics			
W.31	Develop district spending targets or guidelines through the performance audit process for spending on co-curricular activities such as athletics.	Intact	Expenditures are broken down separately for all extracurricular and co-curricular activities. Budgets are set and controlled as with all other district expenditures.
W.32	Report athletic costs separately to TEA as part of the district's annual financial reporting. Fund non-athletic activities in the same manner as athletics.	Not Implemented	The district keeps separate financial records, but the separate report to TEA is not mandatory, and therefore they have chosen not to supply it.

Implementation
Status

Rec #

Recommendations

Comments

Accounting

W.33	Assign fixed-asset accounting responsibility to one individual and establish a reasonable time frame in which a district-wide fixed-asset inventory can be completed.	Intact	The district has assigned this responsibility to an assistant superintendent and has conducted a complete fixed-asset inventory; during the process, a number of obsolete or damaged items were discarded. Once all fixed assets were identified, the district instituted theft-control measures to protect assets that were at risk. Using data accumulated during the inventory, the district reviewed their insurance coverage. By eliminating obsolete or damaged goods from their coverage and putting additional theft-control measures in place, the district was able to reduce its insurance costs by \$8,000 annually. This savings more than offset the cost of performing the inventory.
W.34	Evaluate controls needed to ensure data integrity and proper accounting.	Intact	Copy-edit lists corresponding to inventory charges will be signed by the warehouse manager and sent to the central office on a monthly basis. These lists will be attached to receiving reports signed by the appropriate campus personnel. The central office will compare edit-list totals to general ledger inventory reductions on a monthly basis. Any reconciliations will be the responsibility of the warehouse, with a follow-up explanation due in the central office 15 days after receipt of the general-ledger copy. Each month, the central office will compare warehouse charges on the general ledger with charges for the same period in the previous year, taking into consideration any anticipated or known changes in demand.

Rec #	Recommendations	Implementation Status	Comments
Cash Management			
W.35	Develop and proceed with cash-flow analysis.	Intact	A spreadsheet format used by the business office will be prepared on a rolling 12-month projection of anticipated cash availability and cash requirements. The spreadsheet will be used as a primary tool for investing excess funds. To accumulate historical projections and gauge the accuracy of current projections, a similar spreadsheet reflecting actual cash activity will be maintained and updated on a weekly basis.
W.36	Consider making banking arrangements to further enhance improvements achieved in a recent consolidation of district bank accounts.	Not Implemented	No further reduction in bank accounts is anticipated.
W.37	Add a board policy and procedures regarding an optimal mix of different investment types to the district's previously approved investment policy.	Intact	The district's investment options have been extended to TexPool as well as certificates of deposit and government securities.
W.38	Develop bids for the district's depository contracts that require services to be paid for with direct fees rather than compensating balances.	Intact	All Texas school districts bid their depository contract in odd-number years. This contract was re-bid in summer 1993.
Data Processing			
W.39	Establish an information users committee.	Not Implemented	Several attempts have been made to establish a user group. The district has been unsuccessful in accomplishing this task so far.
W.40	Develop a long-range processing plan.	Not Implemented	The district has not developed a long-range plan for data processing. The district does, however, keep its equipment up to date. Currently, they are increasing the range of their present system.
Warehouse Operations			
W.41	Develop fixed-asset tagging procedures.	Intact	Done.

Rec #	Recommendations	Implementation Status	Comments
W.42	Update the warehouse stock list.	Intact	A stock list has been prepared as part of a continuous purchasing process.
W.43	Evaluate automated perpetual-inventory options as part of the district's long-range data processing plan.	Intact	The district has a plan for implementation, but will need several years to accomplish it. The first step was placement of a computer system in the warehouse. Current stock is being fed into the computer, and in another year, all of it will be on the system.

Maintenance and Custodial Operations

W.44	Prepare an inventory of district facilities.	Intact	Inventory records are being compiled for fixed assets. The district already has an inventory for those items that require capital outlays. The remainder of these items are listed on inspection sheets.
W.45	Establish a preventative maintenance schedule.	Intact	New preventative maintenance sheets have been instituted for all crafts. These sheets are comprehensive, including all facilities and equipment. This system replaces preventative maintenance work orders that were used for many years.
W.46	Establish a detailed policy for work prioritization.	Intact	Each campus has been directed to conduct an annual needs assessment and submit a prioritized work list during the year. Campus plans are consolidated; the district then determines which tasks can be done within the year's time and budget constraints. Tasks not completed during one year are not automatically moved to the top of the next years' list. Instead, campuses continually reevaluate their priorities and needs for each new year.
W.47	Develop a maintenance procedure manual.	Modified	The district maintains that the job description manual that has been in place for many years still is appropriate, although several job descriptions have been updated since TSPR's review.

Rec #	Recommendations	Implementation Status	Comments
W.48	Conduct performance evaluations.	Intact	The district has instituted an annual evaluation process. Immediate supervisors in both the maintenance and custodial departments evaluate each employee. Evaluation sheets are reviewed by the principal or director. Each employee is then called in individually, and the evaluation is thoroughly discussed and signed by the employee. This record is kept in the employee's personnel file.
W.49	The department should develop training plans for its staff and provide or arrange for appropriate training.	Intact	The district now provides constant on-the-job training for all new employees in the maintenance and custodial departments. To comply with all state mandates, personnel are sent to seminars and refresher courses in their skills areas. Vendors also are asked to demonstrate their products and show employees the best way to perform specific skilled tasks.
W.50	Evaluate the district's computer system in conjunction with the long-range data processing plan.	Intact	A new NCR computer system will allow for this in the future. Software is available and will be purchased.
W.51	Determine vendor interest in competitively bidding large groups of district consumables on a single contract.	Intact	The district has aggressively sought vendor interest in combined contracts of this nature. The district also is involved in Region 5 bidding cooperatives for food services, office supplies, instructional supplies, AV equipment, computers and peripheral items.
W.52	Maintain work-order volume and backlog data.	Intact	The district has created an efficient manual system that provides information that can be used to develop cost estimates regarding parts and entire projects.

Rec #	Recommendations	Implementation Status	Comments
Food Service Operations			
W.53	Conduct formal user surveys.	Intact	To encourage open communication among students, parents and school administration, the district has begun inviting one person from the PTA associated with each school to sample and evaluate school lunches on a monthly or bi-monthly basis. Students also were asked to complete evaluation forms and to participate in planning weekly menus. In addition, the high school's homemaking class is developing a survey that will compare the district's food services to fast-food restaurants and other eating establishments. The results will be reported to the food-service manager who will use the information in decision making.
W.54	Institute training programs for food-service personnel.	Intact	In addition to the three-day training session sponsored by TEA and the Texas State Food Service Association (TSFSA) each year, classes are held in Region 5 for food service personnel. Most classes are held at night with employees paying to attend.
W.55	Document training programs.	Intact	One of the requirements for continued certification by TSFSA is at least 40 hours of classes every three years. TSFSA maintains a record of training hours attended. About one-third of the district's food service employees are certified and four more employees are waiting for their certification.
W.56	Institute controls on the sale of meal tickets to ensure that payments are received.	Intact	Done.

