

Spring ISD Progress Report

Introduction

Since 1991, the *Texas School Performance Review* (TSPR) has been helping public school districts across the state meet an increasingly difficult challenge—spending scarce education dollars in the classroom, where they belong, rather than on red tape, paperwork, and overlapping, needless bureaucracy.

Created by state lawmakers as part of the State Comptroller's office in 1990, TSPR fields invitations from public school districts of every size and shape—large or small, rich or poor, rural or urban. Each review team settles in for months of detailed study, at no extra charge to district taxpayers. With the help of outside management experts, we consult a wide range of community groups, business leaders, students, parents, teachers, principals, and administrators. We solicit suggestions from front-line district employees and ask students for their best ideas. We hold public meetings, arrange special focus group forums, and conduct private interviews. And we encourage every concerned citizen to call our toll-free hotline to share their thoughts and suggestions.



TSPR's goal is to identify ways to hold the line on costs, reduce administrative overhead, streamline operations, and improve educational services—in short, to help school districts operate more efficiently and effectively with available resources. Most of the Comptroller's recommendations come directly from teachers, parents, students, and others who live or work in the district. TSPR has found that these hard-working folks have often known for years what would help them improve their schools, if only someone would ask. The Comptroller *asks*.

Since 1991, TSPR has offered nearly 3,100 detailed ways to save taxpayers more than \$340 million in 30 public school districts throughout Texas. And TSPR has done all this without recommending the firing or laying off of a single classroom teacher.

Districts studied by the TSPR team to date include San Antonio, Richland Springs, San Saba, Cherokee, Lubbock, Victoria, West Orange/Cove Consolidated, Lake Travis, Dallas, Austin, Calhoun County, Midland,

Paris, San Marcos Consolidated, Brownsville, Longview, San Angelo, Beaumont, Waco, United in Laredo, Tyler, Houston, Texarkana, Corpus Christi, Spring, Ysleta, Socorro, Port Arthur, Wimberley, and Hamilton. The El Paso, Comal, and Mount Pleasant districts have reviews underway at this time, and a review of Killeen ISD is scheduled to begin in the months ahead.

In addition, TSPR has conducted follow-up reviews of districts that have had at least one year to implement our recommendations. These subsequent reviews show that nearly 89 percent of TSPR's combined proposals have been acted upon, saving local taxpayers more than \$80 million during the first years of implementation, with additional savings projected.

It's important to note that TSPR's work is not a financial audit in the traditional sense. Our purpose isn't to uncover financial wrongdoing or other potential criminal activities. Instead, each school performance review tries to show participating districts how they might accomplish more with the same money. Our team has recommended ways to streamline administrative functions, transportation and food service, improve campus security, reduce maintenance costs, and more efficiently manage facilities. We've proposed revamped investment strategies, better strategic planning, and privatization of certain district services.

Many of our recommendations aren't simply cost-cutting measures or easily quantifiable in dollar terms. Some have no direct fiscal effect at all, while others call for increased spending to attract greater public and private funding. All, however, promise improvements in student services and administrative efficiency.

The response to TSPR has ranged from enthusiasm to caution. In more than a few districts, the superintendent and most board members signaled their support early on and ultimately went above and beyond the proposals in the Comptroller's report to make major improvements in areas not even suggested. In one district, however, our report was about as welcome as fire ants at a Sunday picnic. Yet, even there, district officials eventually recognized the value of TSPR's proposals and achieved impressive results by implementing them. Indeed, most have learned that a TSPR report can serve as a foil against the backlash of unpopular but necessary change. Sometimes, only an impartial third party is truly able to explore certain "untouchable" topics in a district.

By acting on TSPR's proposals, all districts reviewed to date have cut their operating costs. In Lubbock, for example, the Superintendent Mike Moses, now the state's Commissioner of Education, wrote that the 1992 *Texas School Performance Review* was one of the primary reasons [that]

the Lubbock Independent School District was able to regain credibility with this community."

Anyone seeking detailed information on a district's previous performance review is encouraged to call TSPR toll-free, or visit the Comptroller's website at <http://www.window.state.tx.us>.

TSPR in Spring, Texas

In April 1997, at the invitation of the Spring Independent School District (SISD) Board of Trustees and then-superintendent Dr. Gordon Anderson, TSPR began a five-month review of SISD. As in previous reviews of Texas school districts, the Comptroller's team drew upon the expertise of outside management consultants, in this case WCL Enterprises. During visits to the district, the TSPR team held two public forums at area high schools, conducted more than a dozen focus group sessions, and interviewed hundreds of people who live and work in the community, including business leaders, district employees, school board members, and other community representatives. In addition, TSPR drew upon a written survey of 602 students, 249 teachers, and 247 families that was conducted by the district just prior to the review.

The review team targeted 12 areas:

- District organization and management
- Educational service delivery and performance measures
- Community involvement
- Personnel management
- Facilities use and management
- Financial management
- Asset and risk management
- Purchasing
- Computers and technology
- Food service
- Transportation
- Safety and security

In short, we found an extremely well-run district. From the start, the review team recognized that the SISD was among the best in the state and, perhaps, the nation. The resulting report contained a long list of exemplary programs that other school districts could take as examples. In this last year, TSPR has worked diligently to share SISD's best practices around the state.

Still, the superintendent and the board challenged TSPR to find ways to make a good district even better. It was in that spirit that TSPR identified 102 recommendations for improvement, while addressing three key challenges: (1) rapid enrollment growth of more than 10 percent over the previous five years that was taxing all of the district's resources, including facilities and staff; (2) a shifting demographic mix among the student population that required the district to examine some of its traditional teaching methods; and (3) a pending change in leadership with the

retirement of Dr. Anderson after 16 years in the district and the retirement of several veteran district staff.

Adding to this theme of uncertain change, in November 1996, SISD's voters for the first time in modern history turned down a \$99.5 million bond proposal that would have paid for building two new elementary schools, renovation of a number of other campuses, and significant technology improvements across the district. In all, the timing appeared right for a comprehensive review of district operations with an eye toward ensuring that SISD would continue to perform at peak levels, and that administrators, teachers, parents, and community residents could take the steps needed to lift the district to greater achievements.

Without hesitation, the new superintendent, Dr. John Folks, embraced TSPR's report as a valuable tool. Under his leadership, administrators came forward ready and willing to implement the Comptroller's recommendations. The superintendent offered his assistance in translating the details of recommendations into decisive action and assigned coordination of implementation to the executive assistant for Board and Publications Services. Perhaps most significantly of all, board members gave each recommendation their prompt consideration and review.

The district used the report to publicize exemplary programs by developing a brochure listing each of the report's 60 commendations, dubbing them "60 Reasons why Spring ISD is considered an Excellent School District."

Since September 1997, SISD has completed 66 of the original 102 recommendations, saving \$1.6 million to date. Another 22 recommendations are in progress, leaving six recommendations not implemented, and eight more rejected outright. These results show definitive progress, signaling even greater future gains.

Spring ISD Report Card

Chapter	Total	Complete	In Progress	Not Implemented	Rejected	Percent Complete/ In Progress	Grades
District Organization and Management	6	3	2	0	1	50%/33%	Satisfactory
Educational Service	14	6	8	0	0	43%/57%	Satisfactory

Delivery and Performance Measures							
Community Involvement	14	10	2	0	2	71%/14%	Satisfactory
Personnel Management	7	3	3	0	1	43%/43%	Satisfactory
Facilities and Energy Management	11	9	2	0	0	82%/18%	Excellent
Financial Management	4	4	0	0	0	100%/0%	Excellent
Asset and Risk Management	7	3	1	1	2	43%/14%	Needs work
Purchasing and Warehouse Services	5	5	0	0	0	100%/0%	Excellent
Computers and Technology	6	5	1	0	0	83%/17%	Excellent
Food Service	15	11	2	1	1	73%/13%	Satisfactory
Transportation	9	4	0	4	1	44%/0%	Needs work
Safety and Security	4	3	1	0	0	75%/25%	Satisfactory
Overall Grade	102	66	22	6	8	65%/22%	Satisfactory
Excellent = More than 80% complete							
Satisfactory = 80% to 100% complete or in progress							
Needs Work = Less than 80% complete or in progress							

Exemplary Practices

TSPR identified a number of exemplary programs and practices and highlighted them in the final report. These programs and services are presented below, with updates on how SISD has enhanced them even further. TSPR encourages other districts to study them and determine whether they can be adapted to meet their own local needs.

- The SISD board has defined its role as policy-maker and avoids interference in day-to-day administration. Board committees allow members to focus on key policy issues, while maintaining a positive staff working relationship. Confidence and trust among the board members and the administration are evident.

In an effort to better address emerging issues as recommended by the Comptroller, the Spring board of trustees reorganized the committee structure of the board. Board members indicated the move has also served to better match key administrative roles under the new organization of the district with the focus of each committee.

- Link Elementary School established its School/Community Leadership Project in 1991 geared toward improving the quality of life of community residents, ridding the community of criminal influences, and being free of drugs and alcohol. The project has led to a community awareness parade and festival, a breakfast for parents of students in grades 4 and 5, and an international culture festival. On another front, Link Elementary maintains The Parent Link, emphasizing more parental involvement in education and practical parent education bringing trained parents in contact with other parents to discuss and resolve child-rearing issues.

Link Elementary continues its School/Community Leadership Project, and Parent Link. During the last school year more than 1,060 parents and community members participated in one of these endeavors.

- Wells Middle School's Success Club addresses student's behavioral and learning needs. Initially funded through a grant from the SISD Education Foundation, the club's members are students selected based on low or failing grades, zeros on daily assignments, poor performance on the state-mandated Texas Assessment of Academic Skills (TAAS), and evidence of poor study habits. Participants attend individualized two-hour sessions after school. Gains in grades and TAAS scores suggest the program works; it is being expanded to more schools in 1997-98.

During the 1997-98 school year, the Success Club was presented as an Innovative Program at the Texas Middle School Association Convention, received a second Spring Education Foundation grant, and support from the Exxon Education Involvement Fund. Achievement data showed that 100 percent of students who participated in the Success Club were promoted to the next grade and made marked improvement on their TAAS scores.

- SISD uses innovative compensation strategies, including a performance-based pay plan and exceptional benefits, to attract and retain highly qualified personnel and reinforce the achievement of district priorities. In addition, SISD's performance appraisal system directly ties performance to professional development and compensation.

SISD's performance based pay plan continues to be a model program for districts across the state, and has regularly been cited by TSPR in recommendations for districts without meaningful evaluation and reward systems.

- As part of its energy management program, SISD developed a rebate program that rewards schools for efficient energy use. A school that reduces its usage below the budgeted amount shares the cost savings with the district. The school gets half the dollar savings, and the district uses the other half to fund energy-related building and equipment improvements.

During the 1997-98 school year, 20 of the 21 schools were able to reduce their energy costs below the budgeted amounts and shared in \$116,740.64 savings.

- SISD's budget planning process ties budget expenditures to specific priorities established in the district's Five-Year Education Plan. The SISD budget is amended only three times a year, and amendments are reviewed and approved by the board during a normal budget review cycle.

The district completed a revision of its new Five-Year Education Plan, and the current 1998-99 year budget was tied directly to the revised priorities established in that plan.

- Workers' Compensation claims have been reduced 46 percent since 1995-96, after the addition of a director of Safety and Compliance and the initiation of policies and procedures that identify areas for safety improvement.

Workers' Compensation claims continue to remain low, and the district regularly looks for opportunities to improve safety in every area.

- Purchasing cooperatives have saved SISD money in buying milk, tires, and other supplies. The tire cooperative was created by SISD because district officials realized they were not getting the best possible prices. Other area districts joined in, and SISD handles the bidding process for 26 districts. As a result, tires cost 13 percent less than what SISD previously paid.

Today the district's tire purchasing cooperative, as well as the other cooperatives in which it participates, continue to provide SISD as well as the participating districts significant values.

- SISD has implemented a cash management system in school cafeterias that ensures the confidentiality of students participating in the federal free- and reduced-price meal program. All students enter a payment identification number at the point of sale, so participating students' economic status remain confidential. As a result, student participation in the meal programs has increased, a fact recognized in 1996-97 by the Texas Food Service Association.

SISD's Food Service Department has increased both breakfast and lunch participation rates (27.3 percent and 14.1 percent, respectively) and has received national recognition for their efforts from the American School Food Service Foundation.

- In 1994, SISD's director of Transportation led the development and implementation of a state cooperative training course offered by the Texas Association for Pupil Transportation and Texas A&M University, called "Train the Trainer." The five-day course follows a detailed manual and provides behind-the-wheel instruction, leading to a range of driving skills not duplicated by most districts.

The training efforts of SISD's Transportation function continues to be an exemplary program that is being used as a model in other school districts across the state.

- SISD obtained a drug detection dog at a fraction of the cost of contracting for such an outside service. The annual \$1,500 cost of maintaining the dog favorably contrasts to an annual contract price of \$19,000.

Detective Barkley, as the dog is known, has become the subject of several recommendations made by TSPR in districts that are either

contracting for the services of a drug detection canine, or are not making use of a dog as part of the prevention or intervention aspects of their overall safety programs.

TSPR Key Recommendations

District Organization and Management

#1 Annually evaluate the committee structure to ensure it addresses critical areas of district operations.

According to administrators and board members, the new committee structure of the board is more efficient and allows the board to focus on critical and emerging issues. The new administrative structure also lines up nicely with the new board structure. Key administrators now have only one board committee with which to work. In addition, rethinking the board and organizational structure helped to integrate the new superintendent into the district. According to administrators and board members, however, *trust* remains the key element in making any board committee structure work.

#3 Develop an internal management training program.

The new Spring Administrative Leadership Academy and its 52 staff trainees promise to have a profound impact on the future as participating individuals assume leadership roles. After the first weekly session, the superintendent reported a high level of excitement among participants, giving employees a better understanding of the district's day-to-day workings. The likely outcome is an immediate improvement in productivity.

#5 Reorganize the department of Board/Community Services.

As a result of the reorganization, community outreach has improved and district leadership believes the department is working more closely with the schools to promote district programs.

Educational Service Delivery

#7 Create a site-based decision-making model assigning specific responsibilities for decision-making to school employees, administrators, and the board.

The district developed a site-based decision-making matrix after examining successful models used by the Spring Branch ISD and others. In developing the matrix, principals and committee members examined their own roles and evaluated certain aspects of how the process has generally worked. Not only does the new matrix clearly define individual roles and responsibilities, but after evaluating its site-based decision-

making approach, district officials believe the participants have designed a stronger and more workable system.

#9 Apply model practices to eliminate the gap in performance on the Texas Assessment of Academic Skills (TAAS) between African American and Anglo students.

#10 Address the difference in positive achievement between reading and math as measured by norm-referenced tests, raising the level of reading achievement to that of math.

#11 Increase the number of schools attaining the "recognized" and "exemplary" ratings.

Each of these three recommendations were noted by SISD administrators as key to a comprehensive rethinking of the way education is delivered in the district. Focusing on the achievement of these goals, the district observed successful programs in other districts and sought expert assistance. They analyzed longitudinal test data for the district, campuses, classrooms, and individual students to determine areas of strength and weakness. From this, strategies were developed to maximize strengths and correct weaknesses. Every campus and teacher now has a plan in place to achieve the goals established by these three recommendations.

Community Involvement

#21 Transfer the program director of School-Community Partnerships to the Board/Community Services Department.

The transfer of the program director to the Personnel & Community Relations Department was key to the district in setting up a new community outreach program and involving a more diverse group of community members in the process.

Personnel Management

#36 Expand minority recruitment efforts.

In response to this recommendation, the district trained 29 minority staff members to serve as staff recruiters. The district understands that training and using minority recruiters was, and will remain, a critical issue for the district as the student population becomes more diverse.

Facility Use and Management

#42 Develop a long-range facilities master plan.

The long-range facilities master plan identified the projects that will be handled by the district's successful bond election, as well as items that will be addressed through the district's maintenance plan, and other considerations that may be addressed, such as additional schools to meet enrollment growth and an auditorium.

#46 Increase the involvement of all district taxpayers in all future facility planning processes.

On February 3, 1998, the district passed a \$69.75 million bond package by an 80 percent margin. The district attributed this to the fact that the district carefully followed the guidance of the SISD performance review and involved an ethnically and geographically diverse group of individuals, held a number of public forums, and listened to and responded to community concerns.

#48 Develop a long-range maintenance program.

As part of the long-range facility planning process, a long-range maintenance program was developed. An additional \$350,000 is allocated in 1998-99 for the systematic replacement of furniture and equipment throughout the district.

Financial Management

#53 Eliminate the position of director of Finance and create the position of Controller to supervise accounting, payroll, fixed assets, and accounts payable functions.

In November 1997, as part of the district's administrative reorganization the finance area was reorganized; the position of director of Finance was eliminated and the position of Controller was created. While the position of Controller has not been filled for budgetary reasons, the area reorganization has resulted in more clearly defined roles and responsibilities for affected employees.

Asset and Risk Management

#60 Revise the job description of the internal auditor to focus on audit responsibilities and prepare an annual audit plan for board approval that reflects these responsibilities.

As part of the departmental reorganization, the job description of the internal auditor was rewritten to concentrate solely on internal audit activities. The internal auditor reports directly to the superintendent. An internal audit plan, approved by the board, is revised annually. During

summer 1998, the internal auditor completed a comprehensive review of the activity funds at every SISD school.

Purchasing

#64 Eliminate the purchase order data specialist position and reassign duties to the purchasing secretary.

#66 Consolidate all warehousing functions within Supply Services and accurately maintain an inventory of all items in the warehouse.

#67 Transfer the maintenance and operations buyer to the Purchasing Department.

#68 Eliminate the Supply Services secretary.

Recommendations #64, #66, #67, and #68 address a total reorganization of the purchasing and warehousing function of the district, including the consolidation of the warehouse and Supply Services functions. Through the reorganization, the district was able to eliminate 1.5 positions, while increasing control over the entire purchasing process.

Computers and Technology

#69 Translate the current five-year technology plan into a practical tool and designate responsibility for implementation to the assistant superintendent.

District officials realized they needed to have their vision for technology documented so that it could be more easily communicated to the community in general. The current plan documents that vision, and assigns responsibility for implementation to the executive assistant to the superintendent for administration, as suggested by the recommendation.

#73 Connect all schools to the high-speed WAN.

By December 1997 all elementary schools were connected to the wide area network (WAN), completing the connection of all schools. The cost was somewhat higher than anticipated because of the purchase of additional computers required to make the connections useful. The connections made standardization of services possible and greatly expanded services, such as e-mail and on-line access to central office information, especially to elementary schools.

Food Service

#76 Produce management reports by school and use these reports to eliminate duplicative work, increase accountability and productivity, and reduce clerical staff.

This recommendation is still in progress, but once complete, the Food Services Department will have much more timely and accurate information for managing its services.

#78 Formulate a strategy to increase, monitor, and analyze meal participation rates.

The district undertook a major review of its meal participation rates and developed a multi-faceted strategy to increase them. Parents now have the ability to pre-pay for meals using two major credit cards, and can work directly with principals to overcome specific campus-based obstacles to participation. As a result, participation increased by 27.3 percent for breakfast, and 14.1 percent for lunch, with only a 1 percent increase in expenditures. Also, the department won a *Target Your Market* national award for increasing breakfast participation.

#86 Negotiate an exclusive vendor contract for vending machines.

This was by far the largest revenue enhancement resulting from TSPR's recommendations. The district received an initial installment of \$1.6 million that is in the bank drawing interest as a result of an 11-year sponsorship agreement with the Pepsi-Cola Company. Over the life of the contract, SISD stands to receive more than \$6 million, as well as additional commissions on sales and other incentives to go to campus organizations that operate the machines. While specifics of how the money will be used are pending, administrators and board members indicated a desire to use the money for program and facility enhancements.

Transportation

#90 The Transportation Department should prepare a five-year plan that evaluates the district's changing transportation needs and sets objectives to meet them.

#98 Implement and fund a long-term vehicle replacement plan that systematically replaces gasoline-fueled buses with diesel buses.

District officials have recognized the vital importance of safe transportation by prioritizing transportation funding.

Safety and Security

#100 Establish a policy for replacing police vehicles every five years and reduce the fleet to no more than 15 vehicles.

The district took three high mileage vehicles out of service, thereby reducing the fleet to 15, and both bus and police car replacements were considered as part of the five-year planning process. SISD plans to replace three cars per year over the next five school years. As the SISD police chief put it, "You can't do the job unless you can get to the problem."

What still needs to be done

Under the guidance of its superintendent, Dr. John Folks, the Spring Independent School District (SISD) has made significant progress in carefully analyzing and implementing recommendations in the Comptroller's performance review. At no time during the follow-up visit did it appear that any recommendations were cast aside without careful review. Each of the eight rejected recommendations and six recommendations that are not yet implemented came with a thoughtful rationale for delay or non-action.

During discussions with district administrators and board representatives, Texas School Performance Review (TSPR) staff provided background information on recommendations that appeared stalled, and offered assistance should the district wish to pursue some recommendations further. Instead of presenting a laundry list of recommendations not implemented, what follows is a discussion of the areas where TSPR believes improvements can still be achieved should the district decide to pursue the issues.

Transportation

Five of the 14 recommendations either rejected or not implemented appeared in the transportation chapter of the original report. The five recommendations encompass a wide variety of items including eliminating one administrative position and establishing front-line foreman positions (recommendation #93), providing incentives for mechanics who become certified by the National Institute for Automotive Service Excellence (recommendation #94), and purchasing an automatic vehicle wash (recommendation #96). Given the importance of spreading scarce resources to the most critical needs first, SISD's administration understandably opted to address the most critical transportation recommendation, calling for a bus replacement policy (recommendation #98), a commitment that will be extremely costly, especially in the first few years.

If the transportation area is to continue to progress, however, the board and administration should continue to work toward full implementation of each of the remaining recommendations. Especially critical is the establishment of front-line foreman positions to ensure safety and employee performance. The director of Transportation's span of control remains too great to provide the degree of supervision needed to manage day-to-day activities. Delayed implementation of this recommendation will stunt the ability of the director to move forward with the implementation of the district's five-year plan for transportation.

Energy Management

Two recommendations dealt directly with energy management in the district and the possible use of low-interest loans to retrofit Spring schools with energy-saving equipment (recommendations #51 and #52). Because of an apparent misunderstanding between the district and the State's Energy Conservation Office (SECO) regarding the district's obligation to take action on the identified energy retrofits, the district initially rejected the energy recommendations outright. Since TSPR's follow-up visit, the district has talked again with SECO and is reconsidering the recommendations.

TSPR feels strongly that districts should avail themselves of all possible means of reducing utility costs, which represent a considerable expenditure for any district. Whether SISD decides to finance identified retrofits through bond money, maintenance funds, or through low-interest loans, the payback from energy savings should, in nearly every case, more than pay for the investments over a very short period of time. Once the initial investment is paid off, all future savings can finance more productive endeavors such as educating children.

Student Performance

During the performance review, TSPR was challenged to help SISD, already an exemplary district in its own right, find ways to become even better. In that spirit, TSPR analyzed student performance and found ways to improve it in several areas (Recommendations #9, #10, #11, and #12). The district has taken big strides to address these goals for improvement, and by their own account recognized these recommendations as key issues identified by the review.

TSPR does not expect that SISD will lose site of the goals, since they are integral to the Five-Year Plan for the district with full implementation anticipated by 2002. But in a growing district with ever-changing demographics, it is critical for parents, students, and the community at large to continue to monitor progress and work diligently with the district to fully achieve these goals of improving student performance at all levels.

Technology

Several TSPR recommendations still in progress are directly related to recommendation #72, which calls for an analysis of the business computing needs and a plan to address them. New financial accounting and human resource software is being evaluated, with purchase and installation expected in 1999. The new software has the potential of addressing problems identified in the fixed asset area (recommendation

#58), the scanning and maintenance of personnel files (recommendation #39), and the interface between the payroll and personnel programming that in the past caused inaccuracies with some payroll checks (recommendation #56).

TSPR recognizes the additional efficiencies that may be achieved through the purchase of this software, and encourages the district to move forward with purchase and installation. But the review team also cautions the district to go beyond a mere replacement of existing applications with similar applications. Rather it should fully explore all possible advantages offered by these softwares, even if it means changing the way the district handles its business functions.

Asset and Risk Management

SISD has clearly rejected two of seven recommendations (recommendations #57 and #59) in the asset and risk area. One additional recommendation to prepare a debt issuance manual (recommendation #63) has not yet been addressed. TSPR understands that the timing may not be right for implementation of these recommendations today, but hopes the district will remain open to further review in the future.

SISD's Ideas For Improving the TSPR Process

The Texas School Performance Review (TSPR) team does not assume that its process for performing school district reviews works so well that it cannot be improved. In any district TSPR reviews, there will always be elements of the review method itself that can be improved or carried out differently. As part of the progress report preparation, we ask districts what went right and what went wrong-and how we might do better.

SISD administrators and board members offered helpful suggestions to improve our future school district reviews. The district began by stating that 94 of the 102 recommendations made by TSPR linked directly to the priorities contained in the district's Five-Year Education Plan, evidence that TSPR had a good understanding of the district and the direction that the board and community had laid out for the future.

They also thanked the Comptroller for commendations in the report, and recommended that in future reviews the commendations be numbered similarly to the numbering of recommendations. In an effort to emphasize these exemplary programs, the district prepared a separate brochure listing the report's 60 commendations or reasons why the Comptroller found SISD to be one of the finest districts in Texas.

Reviewing the reviewers, SISD administrators offered a number of hints to help us improve our work:

- Administrators felt that had they had the format for the progress report "Status of Recommendations" at the time the report was first released, they could have begun to gather data for the follow-up visit in an appropriate format. Instead, they devised their own reporting tool to report progress to the board, and later converted their format to meet the Comptroller's needs. TSPR agrees with this concept, and will provide a progress report template to each of the five districts that have each recently undergone reviews so district officials can begin gathering progress information in that format.
- In looking at the Comptroller's terminology for characterizing the status of recommendations, SISD officials said the term "rejected" was a harsh way to term a recommendation that a district did not feel should or could be implemented. While this term may appear harsh to some, there is a need to differentiate between recommendations not yet implemented; recommendations that the district agrees should be implemented when circumstances warrant; and recommendations that have been analyzed by a district and outright rejected. Suggestions for more appropriate terminology, however, will be considered.

- District officials said implementation strategies and timelines did not contain sufficient detail in some cases, and in other cases recommendations were vague, with more clarity in the implementation strategies. They expressed a desire for more clarification and specifics on what exactly the district was expected to do to complete each recommendation. The examples noted by SISD were reviewed by TSPR and every attempt will be made to improve the quality and consistency of recommendations and corresponding implementation strategies and timelines.
- District officials were confused by some one-time savings and costs presented in the performance review as net amounts in fiscal impact boxes following recommendations. In district reviews conducted since Spring, TSPR has separated out one-time savings and costs from ongoing savings in an effort to eliminate such concerns.
- Recommendations #17, #60, #81, and #95 are examples of recommendations calling for action on multiple items at once. These recommendations each stem from one set of findings. The district found it extremely difficult to address the multiple issues since implementation might involve staff from multiple areas of the district. Further, it was difficult to decide if each recommendation was complete, since there were so many detailed facets. TSPR agrees this is a problem and will work harder to simplify recommendations so they stand alone.
- Finally, district officials suggested that TSPR send out mailings to Texas school districts each time a new report is issued, and put links to the Texas Association of School Boards (TASB), the Texas Association of School Business Officials (TASBO), and other educational Internet sites to the Comptroller's *Windows on State Government* (www.window.state.tx.us) so that school districts will know when a school district performance review is issued. This is something that TSPR will immediately work to achieve. If districts throughout the state are to benefit from these reviews, TSPR needs to ensure full communication.

Status of Recommendations and Savings – Part 1

Chapter 1 - (Rec#1) through Chapter 5 - (Rec#52)

Rec. #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	Five-Year Savings (Costs) Estimates	Comments
Chapter 1: District Organization and Management						
1	Annually evaluate the committee structure to ensure it addresses critical areas of district operations. (p. 32)	Complete	\$0	\$0	\$0	On November 11, 1997 policy BDB (Local)-Board Committees was revised. The Audit Committee was renamed the Finance Committee and its duties were expanded to include some of the areas previously considered by the Insurance and Legal Committee. The Insurance and Legal Committee was eliminated and replaced with the Technology Committee to reflect the district's focus on improving technology for students and staff. The Planning and Evaluation Committee was renamed the Educational Planning and Evaluation Committee. The Construction/Renovation Committee was renamed the Facilities Planning Committee. The Policy Committee was unchanged. A senior staff member has been assigned to each committee, which has enhanced the exchange of information between the district and the board. This structure has improved

						trust and allows the board to consider critical issues in advance of board meetings.
2	Adopt Texas State Library and Archives Commission standards for electronic records and begin scanning historical documents and minutes of all meetings for storage. (p. 33)	In Progress	\$0	\$0	\$0	The district has been electronically scanning board meeting minutes and personnel files for several years prior to the development of this recommendation. Document retention schedules have been established, although the district continues to keep all paper files.
3	Develop an internal management training program. (p. 43)	In Progress	\$0	\$0	\$0	Implementation of the Spring Administrative Leadership Academy was authorized by senior staff on June 9, 1998. The initial session for 52 staff members was held on September 17, 1998. Sam Houston State University will give college credit for SISD employees who attend these mid-management courses.
4	Align the district's organization to address emerging priorities. (p. 44)	Complete	\$0	\$0	\$0	A reorganization of the district's administrative staff became effective November 1, 1997. The reorganization reflected the superintendent's assessment of the strengths of the current administrative staff and how those strengths could be directed to improve services provided to students, teachers, and the community that support

						these efforts. An assistant superintendent of Support Services position was added.
5	Reorganize the department of Board/Community Services. (p. 47)	Complete	(\$252,000)	(\$112,360)	(\$608,577)	As part of the re-organization of the district's administrative staff on November 1, 1997, an Office of Community Relations was established under the assistant superintendent for Personnel and Community Relations. The Board and Community Services department was renamed Board and Publications Services. The district believes the reorganization has improved the district's community outreach efforts and its relationship with individual schools through a marketing plan.
6	Physically place the paraprofessional staff of the Superintendent's Office and Board/Community Services in one area to support both departments. (p. 48)	Rejected	\$0	\$0	\$0	This recommendation was not implemented because SISD officials believe that cost and physical space make it cost-prohibitive.
Chapter 2: Educational Service Delivery and Performance Measures						
7	Create a site-based decision-making model assigning specific responsibilities for decision-making to school employees.	Complete	\$0	\$0	\$0	At the beginning of the 1997-98 spring semester, the superintendent appointed a committee of eight principals to review the district's site-based decision-making process. The committee developed

	administrators, and the board. (p. 64)					a responsibility matrix for the various groups involved in decision-making. On June 9, 1998, the board adopted revisions to policies BQA (Local)-Participation in Decision-Making and BQB (Local)-Campus Advisory Committee as a step in implementing the revised process. Spring Branch and Katy models were reviewed in the development of the Spring model. The planning committee is responsible for evaluating the district's progress.
8	Expand efforts to track SISD graduates by establishing a data-sharing agreement with the State Occupational Information Coordinating Committee (SOICC) to participate in the automated student follow-up system. (p. 71)	Complete	(\$8,616)	\$0	\$0	SISD participated in SOICC's automated student and adult learner follow-up system for seniors graduating in 1996-97. There was no charge to the district to participate.
9	Apply model practices to eliminate the gap in performance on the Texas Assessment of Academic Skills (TAAS) between African American and Anglo	In Progress	\$0	\$0	\$0	Data from spring 1997 and spring 1998 showed clear evidence of the reduction of the achievement gap in TAAS reading, mathematics, and writing passing rates. From spring 1996 to spring 1998, the achievement gap for African American students

	students and Hispanic and Anglo students. (p. 91)					has been reduced by 7 points in reading, math, writing and all tests taken; for Hispanic students by 3 points in reading, 8 points in math, 1 point in writing and 6 points in all tests taken; and for economically-disadvantaged students by 4 points in reading, 6 points in math, 1 point in writing and 5 points for all tests taken. While SISD's goal is to eliminate the gap entirely by 2002, an implementation plan is ongoing.
10	Address the difference in positive achievement between reading and math as measured by norm-referenced tests, raising the level of reading achievement to that of math. (p. 94)	In Progress	\$0	\$0	\$0	SISD selected a new achievement test, the Stanford Achievement Test, for use in the 1997-98 school year. A Reading Study Team reviewed the achievement results and has recommended changes, some of which were implemented through the Connections Project and others through staff development efforts. Complete implementation of this recommendation is targeted for June 2002.
11	Increase the number of schools attaining the "recognized" and "exemplary" ratings. (p. 101)	In Progress	\$0	\$0	\$0	According to TEA results released August 3, 1998, the same number of (but not the same) campuses were rated "recognized" (6) and "exemplary" (2) in 1997-98 as in 1996-97. Four additional campuses missed the next higher accountability rating by fewer than five students

						each. By analyzing text data, individual campuses and teachers are able to identify students needing additional attention so that curriculum weaknesses can be adjusted.
12	Apply exemplary aspects of peer district programs to prepare graduates for college. (p.107)	In Progress	\$0	\$0	\$0	A review of surrounding districts revealed a variety of SAT preparation strategies that fall into three categories: short term test awareness workshops; longer strategies such as semester college preparatory seminars; and long-term efforts embedded in curriculum. SISD high school principals have included in their campus improvement plan an objective and a set of activities for increasing participation in and preparation for SAT/ACT. Activities include maintaining existing long-term curriculum efforts, maintaining special classes, such as Word Power, to increase PSAT/SAT and ACT scores, exploring similar types of mid-range strategies for consideration as semester courses, and increasing awareness sessions.
13	Adjust attendance boundaries to create identifiable school attendance patterns wherever possible, without creating additional	In Progress	\$0	\$0	\$0	At the March 10, 1998 board meeting attendance zones for Salyers and Winship elementary schools, Bammel and Twin Creeks middle schools, and Sprinø and Westfield high

	crowding. (p.110)					schools were adjusted for the 1998-99 school year to reduce crowding at Salyers, Bammel, and Westfield. SISD recognizes additional adjustments will be necessary but has chosen to delay further adjustments until new schools are constructed.
14	Ensure proportional representation of ethnic group members among SISD's teaching, counseling, and leadership forces. (p.115)	In Progress	\$0	\$0	\$0	This initiative was put in the district's five-year plan but, the district believes it is an initiative that will be difficult to fully achieve due to limited availability of minority teachers and administrators. In a comparison of professional staff for the 1996-97 school year, the 1997-98 school year showed a 1.17 percent increase in staff members who were Black/Not Hispanic, a 1.08 percent increase in staff members who were Asian/Pacific, and a 0.53 percent increase in staff members who were Hispanic.
15	Give teachers more opportunities to share teaching strategies and successful programs across grade levels and schools. (p. 19)	In Progress	\$0	\$0	\$0	Staff development plans for the 1998-99 school year, as listed in the 1998 Summer Staff Development booklet that was distributed to staff in May 1998, include opportunities for teachers to share strategies and successful programs across grade levels and schools. The creation of Elementary and Secondary School

						Improvement positions will help SISD achieve additional opportunities. Full implementation is scheduled by June 2002.
16	Create a special pool of substitute teachers trained to work with special education and Limited English Proficient (LEP) students. (p.120)	In Progress	\$0	\$0	\$0	While an overall shortage of substitutes during the 1997-98 school year prevented completion, training was provided to substitutes in these specific areas. More emphasis will be provided this year; 12 training sessions were offered to all substitutes, five of which were mandatory, including special education and LEP training will be ongoing.
17	Evaluate the quality of special education placement information provided to ARD committees, and seek assistance from the Region 20 Education Service Center to build capacity of district staff to serve students with disabilities. (p.124)	Complete	\$0	\$0	\$0	A study was completed in June 1998 regarding percentages of special education students by handicapping condition, comparing SISD's numbers to those of other districts and to national percentages. Regional Education Service Center 4 (Region 4) responded to the district's request for training materials. Those materials have been used on each elementary campus. A case management approach has been initiated at the high school level. A special educator is assigned to each student to function as a daily resource and advocate for the student. Teachers, parents and students can depend upon the case manager for

						information, referral and any other assistance needed. District officials believe that this model will build capacity at the secondary level and maintain placement in the least restrictive environment.
18	Analyze special education expenditures and revenues and seek to maximize the district's resources. (p.126)	Complete	\$0	\$0	\$0	A Special Education Task Force undertook a thorough examination of revenues, expenses, and staffing in November 1997. A follow-up to that report was made with visits to two districts, but no adjustments have been made to staffing patterns as a result of these activities. The district concluded that similar districts have comparable personnel plans which comprise approximately 85 percent of the special education budget in the district. SISD is exploring the possibility that the differences between SISD and comparison districts might be explained by PEIMS coding practices.
19	SISD should review Career and Technology Education (CTE) programs that are undersubscribed to eliminate or re-direct them to meet the needs of students. (p. 132)	Complete	\$0	\$0	\$0	Following the guidelines in the Process for Program Evaluation in Career and Technology Education, steps were taken to close two Career and Technology Education programs (Horticulture at Wunsche and Criminal Justice at Spring High) that were undersubscribed. The North Harris Community

						College, through an articulation agreement, is providing two classes on criminal justice. A system is in place whereby the superintendent evaluates the classes with low enrollment to determine whether they should continue.
20	Review SISD assessment procedures for identifying gifted and talented students to ensure that a wide range of measures are used. (p.135)	Complete	\$0	\$0	\$0	As the result of a review of procedures for identifying gifted and talented students, two revisions have been made: 1) a change on the assessment procedures that includes more teacher input; and 2) the Gifted and Talented Plan has been revised to reflect the changes in progress. More emphasis has been placed on science and social studies.

Chapter 3: Community Involvement

21	Transfer the program director for School-Community Partnerships into the Board/Community Services Department. (p. 141)	Complete	\$0	\$0	\$0	As part of the administrative re-organization on November 1, 1997, the program director for School-Community Partnerships was transferred from the Curriculum and Instructional Services Department to become the director of Community Relations in the Personnel and Community Relations Department. The department has set goals, objectives, and activities for this program.
22	Transfer web page development and	Rejected	\$0	\$0	\$0	This recommendation was not implemented because

	<p>maintenance duties to the Office of the Manager of Technical Support and Software Development in the MIS Department. (p. 141)</p>					<p>the district views the web page as a significant publication/communication mechanism. It views the board and Publications Services office as having the needed information, perspective, and technical expertise for web page development.</p>
23	<p>Reassign board support functions to a paraprofessional in the superintendent's office. (p. 142)</p>	Complete	\$0	\$0	\$0	<p>As a result of the administrative re-organization implemented on November 1, 1997, the superintendent's secretary performs some board support functions. However, the district believes the executive assistant to the superintendent for Board and Publications Services continues to have the experience and expertise to carry out the board liaison function. And, all community relations responsibilities that were once fragmented are now consolidated.</p>
24	<p>Develop a formal internship program in cooperation with high schools and community colleges. (p. 143)</p>	In Progress	\$0	\$0	\$0	<p>Kingwood College has added the SISD Board and Publications Services office as an intern site for the program operated by that college. Depending upon the availability of students, an intern will be in place during the 1998-99 school year. The intern will work free of charge but will receive college credit for participating.</p>
25	<p>Increase Spring</p>	In Progress	(\$89,640)	(\$10,344)	(\$51,720)	<p>The district increased the</p>

	Schools' frequency to five issues a year. (p.146)					number of issues of <i>Spring Schools</i> published during 1997-98 from one to three, and a community calendar was also mailed. That same number is budgeted for 1998-99, but the district has a goal of increasing the issues of <i>Spring Schools</i> to four in future years.
26	Convert <i>SpringBoard</i> to an employee newsletter and modify its content to reflect the change. (p.147)	Rejected	\$149,175	\$0	\$0	With the absence of a local daily newspaper, <i>SpringBoard</i> serves a major role in keeping the district's staff well informed. Reducing its distribution to five times a year after 16 years of weekly distribution would send a negative message to the staff.
27	Develop new ways of identifying and selecting committee members. (p.151)	Complete	\$0	\$0	\$0	A new Management Guideline, BQ-Advisory Committee Representation, was adopted by senior staff on May 12, 1998. The procedure ensures, to the extent possible, representation on each committee so that they reflect the community's gender, diversity, and culture.
28	Take steps to identify and address the needs of SISD's increasingly diverse student and constituent population. (p. 152)	Complete	\$0	\$0	\$0	Identifying and addressing needs of the district's increasingly diverse student and constituent population during the 1997-98 school year were reflected in the following Five-Year Education Plan priorities and objectives: Priority I. Objectives 2 and

						<p>3.9; Priority 2, Objectives 4 and 5; and Priority 3, Objectives 1.1, 1.5 and 1.6. The District trained 29 minority staff members to serve as staff recruiters. At 46 off-campus interview sites, 263 of the 1,077 potential staff members who were contacted were minorities. Work is also underway through the Community Relations Department, the Board and Publications Services Department, and Curriculum and Instruction program directors to ensure that all communications are consistent with the district's image and message. Focus group sessions, made up of senior citizens, businesses, students religious organizations, etc. were conducted to gather perceptions about SISD. Responses were varied but the district can build from what they learned and incorporate this knowledge into campus and district plans.</p>
29	<p>Convene an annual summit to address ways to increase parent and community involvement in the schools. (p.153)</p>	Complete	\$0	\$0	\$0	<p>A "Parent Connections Conference" was held on October 18, 1997 and was well-attended. Another conference is planned for this year, although no date is set. SISD prepared a full report on the results of the summit.</p>
30	<p>Encourage public</p>	Complete	\$0	\$0	\$0	<p>"Your Turn" forums were</p>

	<p>participation in board meetings by reassessing current practices. (p. 155)</p>					<p>held by the board at four middle schools during 1997-98 to encourage public participation, although only one parent spoke. The board sent a notice to all homeowner and civic associations in September 1997 advising them of the availability of trustees as guest speakers. The established board meeting format was not changed to allow public comments at the beginning of meetings since procedures allow people to sign up to speak to items on the agenda before board action on such items. However, this year's board meeting time was moved up one half hour allowing more time for public comment.</p>
31	<p>Involve constituents in any future decision-making processes such as bond elections and tax rate hikes by having geographically dispersed meetings to explain the elements of the issue, answer questions, and address concerns. (p.156)</p>	Complete	\$0	\$0	\$0	<p>In September 1997, the superintendent appointed an ethnically and geographically diverse 29-member Citizens Advisory Committee to provide input on the proposed bond issue. The recommendations of that advisory committee were presented at four public meetings on October 28, October 30, November 4, and November 6, 1997, before being presented to the board. Setting up voting places and early voting also helped the bond effort. This proved to be a great organizational</p>

						effort, and the district was invited to describe their efforts in a presentation at the annual conference of the Texas Association of School Boards.
32	Assign the function of volunteer coordination to a staff member in Board/Community Services. (p. 158)	Complete	\$0	\$0	\$0	The function of volunteer coordination was assigned to the two directors of Community Relations when that department was created as part of the administrative re-organization on November 1, 1997.
33	Encourage SISD Education Foundation to expand fundraising efforts. (p.161)	Complete	\$0	\$0	\$0	The SISD Education Foundation's Board was extended to include additional business representatives and a marketing plan was developed. The Foundation's fund-raising efforts were expanded in 1997-98 including the first annual FM 1960 Rotary Bowl A-Thon. In addition, the Foundation is pursuing a \$5,000 grant from AT&T and an annual dinner with a keynote speaker has been proposed.
34	Increase efforts to reach out to merchants in all parts of the district and involve them in mentorships and other school-business partnership activities. (p.162)	Complete	\$0	\$0	\$0	The SISD Business Partnership Advisory Committee developed strategies for categorizing and improving partnerships across campuses during its meetings in September and November 1997.

Chapter 4: Personnel Management

35	Conduct an annual audit of jobs and salaries paid to a selection of positions within SISD and review all positions at least once every four years. (p.178)	Complete	\$0	\$0	\$0	The Personnel Department conducted a Teacher Salary Survey, a Paraprofessional Salary Survey, a Substitute Salary Survey, a Stipend Survey, an Academic Supplement Survey, and a Coaching Supplement Survey during 1997-98. The district conducted studies of manning tables for transportation, maintenance, operations, police, and clerical staff to look at pay inequities and job descriptions. The administrator level was partially addressed in the district's reorganization (see recommendation #4), but an ongoing cyclical review of all classifications will be undertaken in the future.
36	Expand minority recruitment efforts. (p.188)	Complete	\$0	\$0	\$0	In response to this recommendation and the Five-Year Education Plan priority #3, the district trained 29 (up from 16) minority staff members to serve as staff recruiters. At 46 off-campus interview sites, 263 of the 1,077 potential staff members contacted were minorities. SISD recognizes this as a critical ongoing effort.
37	Analyze the affect of lower-than-peer district salaries for starting teachers on overall recruitment efforts. (p. 190)	In Progress	\$0	\$0	\$0	Completion of this recommendation is awaiting statistical information from area school districts to compare the overall effects of lower-than-neer district

						salaries for starting teachers on overall recruitment efforts. Preliminary figures indicate that SISD recruitment and hiring for positions has not been greatly affected by these salaries. SISD began personalizing the communication of its benefits package to current staff in October and will extend that practice to potential teachers.
38	Explore the option of offering a retirement incentive plan. (p.192)	Complete	\$0	\$0	\$0	A "Voluntary Incentive Plan," offered by Educators Preferred Corporation, was considered in May 1998. The superintendent recommended that the plan not be implemented for 1998-99 due to the extremely tight timeline that would make it difficult for staff members to carefully consider the plan and for the district to replace staff who chose the option. The district also believes they will have to narrow the criteria when the plan is examined again to allow for a controlled exit of experienced administrators and teachers so as not to adversely effect the educational process in SISD.
39	Scan the files of all inactive employees and maintain all hard copy personnel	In Progress	\$0	\$0	\$0	SISD's Records Management Program for Personnel Records complies with the Texas Local Government

	files off-site. (p. 195)					Records Act. Due to the significant number of requests for original records from past employees within five years of separation from the district, the hard files are maintained in the Personnel department. All other inactive files are micro-filmed and stored off-site in the Purchasing department. Currently, there is no equipment located in the central administration building to film or read inactive records. The Personnel department will consider purchasing a reader for the department.
40	Maintain automated or scanned files of qualified applicants only and archive all others. (p.196)	Rejected	\$0	\$0	\$0	This recommendation was not implemented due to the significant number of requests from inactive applicants to reactivate files. SISD maintains files of active applicants for the current year and inactive files for the preceding year.
41	Develop a cultural diversity training program for SISD teachers. (p.208)	In Progress	\$0	\$0	\$0	Planning for and implementation of this recommendation was delayed until the 1998-99 school year and will be addressed in conjunction with activities and plans to satisfy Objective 5, Priority 2 of the Five-Year Education Plan by continuing to include cultural diversity as part of curriculum and teacher/administrator

						<p>training. However, some activities were conducted to improve sensitivity towards differences in people of different cultures. Those included a required Substitute In-service session, training of recruiters, attendance by all staff at presentations concerning discrimination of disabled individuals, and emphasis to principals and program directors regarding cultural sensitivity. The district needs to conduct an investigation of all diversity efforts throughout the district to build upon a districtwide initiative. It could use Region 4 or the Harris County Education Department to develop training for teachers. While the district is doing many things in this area, a formal plan does not exist.</p>
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Chapter 5: Facilities Use and Management

42	Develop a long-range facilities master plan. (p. 217)	Complete	\$0	\$0	\$0	<p>The Facility Master Plan was considered by the Facilities Planning Committee on August 25, 1998. It was approved by the board on September 8, 1998. The plan is divided into three categories: projects authorized by 1998 bond election, the maintenance plan, and other considerations (new facilities, existing facilities' upgrades, design fees, etc.).</p>
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43	Establish and approve formal guidelines for assessing educational and operational space needs, by type of space within the district, to be used in making facility and budgeting decisions. (p. 222)	Complete	\$0	\$0	\$0	Management Guideline CS-Facilities Standards was adopted by senior staff on June 30, 1998 to establish a process for assessing educational and operational space needs within the district.
44	Adjust school attendance zones to relieve overcrowding and optimize district space usage. (p. 225)	Complete	\$138,000	\$0	\$0	At the March 10, 1998 board meeting, attendance zones for Salyers and Winship elementary schools, Bammel and Twin Creeks middle schools, and Spring and Westfield high schools were adjusted for the 1998-99 school year to reduce crowding at Salyers, Bammel, and Westfield. No savings were realized since SISD did not sell, but relocated, the portable classroom buildings freed up by the attendance zone changes.
45	Use the established space planning guidelines when constructing new school buildings and building to existing facilities. (p. 228)	Complete	\$0	\$0	\$0	SISD follows the "Adopted Amendments to Chapter 61. School Districts, Subchapter H-School Facilities Standards" in constructing new facilities or when renovations are made to existing facilities.
46	Increase the involvement of all district taxpayers in all future facility planning processes. (p. 230)	Complete	\$0	\$0	\$0	An ethnically and geographically diverse 29-member Citizens Advisory Committee was appointed by the Superintendent in September 1997 to provide

						<p>input on the proposed bond issue. The recommendations of that advisory committee were presented at four public meetings on October 28, October 30, November 4, and November 6, 1997 across the district before being presented to the board. The establishment of a "Kids Come First" committee, with subcommittees at each school, resulted in the second highest voter turnout (4,874) in history. A bond issue, in the amount of \$69,750,000, passed February 3, 1998.</p>
47	<p>Perform a facility needs assessment to determine the district's level of compliance with the Texas Accessibility Standards, Americans with Disabilities Act, and applicable building code. (p.232)</p>	Complete	(\$161,450)	\$0	\$0	<p>An internal facilities survey was completed under the direction of the staff architect and director of Safety and Risk Management.</p>
48	<p>Develop a long-range maintenance program. (p.236)</p>	Complete	\$0	\$0	\$0	<p>The board adopted a "Five-Year Maintenance Plan" on July 14, 1998. The plan addressed the use of approximately \$400,000 to be allocated to the Maintenance budget annually beginning in September 1998. The projects addressed in that plan are primarily the "maintenance-tvne"</p>

						<p>projects which were included in previous bond elections and which raised considerable concern from the community. Included in the 1998-99 budget is a \$350,000 allocation for the systematic replacement of furniture and equipment throughout the district. (See recommendation #42)</p>
49	<p>Implement a method for recovering the costs of Maintenance Department materials and labor used to repair and maintain Food Service Department equipment. (p. 237)</p>	Complete	\$100,000	\$1,584	\$7,984	<p>A procedure and form were created in December 1997 by which the Maintenance Department will invoice the Food Service Department for its labor and material costs to repair and/or maintain the equipment in the Food Service Department.</p>
50	<p>Adjust the amount of training for new building mechanics at their assigned schools to 24 hours (three days), with eight hours at another school. (p.238)</p>	Complete	\$0	\$0	\$0	<p>In November 1997 a written guideline specifying the training program for Building Mechanics was established that included additional training at the assigned campus. According to district administrators, campus principals appreciate the additional training and assistance.</p>
51	<p>Contract with SECO's Energy Efficient School Partnership Service for an energy audit. (p. 241)</p>	In Progress	\$0	\$0	\$0	<p>The District contacted SECO on two separate occasions with the intention of implementing the recommendation. While the audit itself is free, the expectation is that</p>

						<p>if the district were approved for funding from any one of the state's funding sources, SISD should be prepared to accept the financing and proceed with the projects. Due to those projects requiring the district to incur additional debt so soon after the passage of a \$69.75 million bond issue, it was determined that it would not be financially feasible to pursue an energy audit at this time. However, SISD will annually consider the cost and benefits of an energy audit in relation to its other financial requirements when it is financially feasible.</p>
52	<p>Explore alternative methods to fund energy retrofit projects, including SECO's LoanSTAR Program and performance contracts. (p. 244)</p>	In Progress	\$532,000	\$0	\$0	<p>The district completed an exploration of five methods to fund energy retrofit projects in December 1997. Due to the additional debt incurred by the passage of the \$69.75 million bond issue, it was determined that it would not be financially feasible to pursue any of the funding alternatives at this time. However, SISD will annually consider the cost and benefits of an energy audit in relation to its other financial requirements when it is financially feasible.</p>

Status of Recommendations and Savings – Part 2

Chapter 6 - (Rec#53) through Chapter 12 - (Rec#102)

Rec. #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	Five-Year Savings (Costs) Estimates	Comments
Chapter 6: Financial Management						
53	Eliminate the position of director of Finance and create the position of Controller to supervise accounting, payroll, fixed assets, and accounts payable functions. (p. 252)	Complete	\$0	\$0	(\$234,120)	As part of the district's administrative re-organization on Nov. 1, 1997, the position of director of Finance was eliminated and the position of controller was established. The controller position has not been filled for budgetary reasons, but could cost \$75,000 annually. The position of accounting supervisor was eliminated and was replaced with the position of director of Accounting and Budgeting. The position of director of Payroll, PEIMS, and Grant Reporting was established.
54	Transfer the tax office functions to Harris County Tax Assessor-Collector. (p. 257)	Complete	\$436,000	\$30,000	\$210,000	The district concluded that transferring tax collection to Harris County would not increase the

						<p>efficiency and effectiveness of tax collection for SISD. However, the district has sought opportunities to consolidate tax collection efforts with other districts (Huffman ISD now; negotiating with two or three 3 more). For a fee, SISD will do their tax collection. While there may be some costs associated with consolidation, this is a win-win arrangement for all districts involved due to economies of scale.</p>
55	Implement the on-line payroll system at all schools and departments. (p. 259)	Complete	\$40,560	\$9,952	\$49,760	<p>The on-line payroll system was fully implemented as of the March 10, 1998 payroll. The district eliminated the clerical position, but is using a VOE student to help with filing at an hourly wage.</p>
56	Write personnel and payroll procedures to ensure payroll accuracy. (p. 260)	Complete	\$0	\$0	\$0	<p>A written procedure was established as of November 20, 1997. SISD also is working on their programming interface problem as part of a complete reassessment of their administrative technology.</p>

Chapter 7: Asset and Risk Management

57	Assign all property and casualty insurance activities to the director of Safety and Compliance. (p. 274)	Rejected	\$0	\$0	\$0	Property and casualty insurance relates directly to the fixed assets and accounting records. Those records are maintained in the Business Office. The district feels the responsibilities of the Safety and Compliance director relate more directly to staff health and welfare, workers' compensation, and building "health."
58	Develop or purchase an integrated fixed asset module that automatically updates the fixed asset ledger. (p. 276)	In Progress	(\$6,000)	\$0	(\$8,000)	SISD is currently in the process of evaluating new Accounting/Financial software packages, including a fixed asset systems. It is expected that the new financial software will be implemented during 1999.
59	Request fee estimates for external financial audit services and establish a policy of rotating auditors at least every five years. (p. 279)	Rejected	\$64,000	\$0	\$0	The district indicated that audit fees are justified by the audit firm through negotiations with the Finance Committee of the board, and the firm rotates its staff assigned on a regular basis, allowing a "fresh look" at SISD's accounting records by staff who have not been

						associated with SISD in the past. SISD believes that there is no real cost benefit to rotating auditors every five years.
60	Revise the job description of the internal auditor to focus on audit responsibilities and prepare an annual audit plan for board approval that reflects these responsibilities. (p. 280)	Complete	\$0	\$0	\$0	The internal auditor job description was revised in November 1997 to include only audit responsibilities and the annual work plan was revised to reflect those responsibilities. A new internal auditor began work on May 26, 1998, and he reports directly to the superintendent. The auditor's first assignment was to conduct an audit of all the schools' activity funds during the summer of 1998.
61	Eliminate all but one of the debt service bank accounts and all but one of the construction bank accounts. (p. 282)	Complete	\$7,920	\$1,092	\$5,492	All debt service bank accounts, except one, were eliminated effective September 1, 1997 when the conversion was made from NationsBank to Sterling Bank.)
62	Cash flow analysis should be ongoing and include actual cash transactions to enhance the district's interest earnings. (p. 285)	Complete	\$0	\$0	\$0	As of November 20, 1997, cash flow analyses are now performed monthly, with actual cash transactions included.
63	Develop a written debt issuance	Not Implemented	\$0	\$0	\$0	SISD is open to preparing a written

	procedures manual. (p. 286)					manual and will contact Houston ISD to look at their procedures to determine if they can provide a model.
Chapter 8: Purchasing						
64	Eliminate the purchase order data specialist position and reassign duties to the purchasing secretary. (p. 296)	Complete	\$138,726	\$15,414	\$138,726	This recommendation was accomplished with the re-organization of the Purchasing/Supply Services Department in October 1997.
65	Circulate a list of surplus items to all principals and department heads on a quarterly basis and encourage re-use. (p. 297)	Complete	\$25,000	\$5,000	\$25,000	Beginning in October 1997, the Purchasing Department began providing quarterly lists of surpluses stored in the Fixed Asset Warehouse to all principals and department heads. In addition, contests for surplus items are advertised in the monthly Services Review publication. The first caller gets the item.
66	Consolidate all warehousing functions within Supply Services and accurately maintain an inventory of all items in the warehouse. (p. 298)	Complete	\$0	\$0	\$0	As of January 13, 1998, all warehousing functions are handled by Supply Services.
67	Transfer the Maintenance and	Complete	\$0	\$0	\$0	This recommendation was

	Operations buyer to the Purchasing Department. (p. 299)					implemented on January 13, 1998.
68	Eliminate the Supply Services secretary position. (p. 301)	Complete	\$120,000	\$4,800	\$24,000	This recommendation was accomplished with the re-organization of the Purchasing/Supply Services Department in October 1997.
Chapter 9: Computers and Technology						
69	Translate the current five-year technology plan into a practical tool and designate responsibility for implementation to the assistant to the superintendent. (p.315)	Complete	\$0	\$0	\$0	The board achieved this recommendation with adoption of the District's five-year Technology Plan on Feb. 17, 1998.
70	Before upgrading the elementary and high school computer labs, examine all possible alternative configurations and adopt a districtwide vision for instructional technology. (p. 318)	Complete	\$0	\$0	\$0	This recommendation was addressed as part of the District's Technology Plan.
71	Designate or create teacher workstations in the instructional computer labs that are accessible to teachers during	Complete	(\$44,000)	\$0	\$0	As of November 30, 1997, this recommendation was implemented at secondary schools. As of September 18, 1998 all computers

	lunch periods, after school, and on weekends. (p. 320)					in the elementary labs were upgraded and installed with the software recommended for teacher use.
72	As part of the five-year planning process, analyze the business needs of the district and develop a plan to fully address those needs. (p. 321)	In Progress	\$0	\$0	\$0	This recommendation is being implemented as part of the District Technology Plan. New Accounting/Financial and Human Resources software packages are currently being evaluated. Implementation of the new software is expected in 1999.
73	Connect all schools to the high-speed WAN. (p. 323)	Complete	(\$139,000)	(\$148,067)	(\$369,827)	All elementary schools were connected to the Wide Area Network (WAN) by December 31, 1997. The secondary schools were previously connected. T-1 lines and network routers were installed at each elementary school and upgrading some of the workstations in the schools. Adding the elementary schools to the WAN provided them with connectivity to the Internet, SISD's CD tower, and e-mail.
74	Target and solicit	Complete	\$1,450,000	\$40,800	\$392,800	In November 1997.

	support from area businesses, national grant programs, local community leaders, parents, students, and district residents. (p. 325)					the Management Information Services director received a grant from the SISD Education Foundation to provide hardware, software, and materials in support of a Grants Advisory Committee. SISD received 97 computers, with an estimated fair market value of \$400 each from businesses; it also applied for four TIF grant worth \$88,000 each.
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Chapter 10: Food Services

75	Reduce the number of budgeted manager trainee positions to three. (p. 333)	Rejected	\$137,400	\$0	\$0	According to SISD, these positions are filled only as needed to replace, or to prepare to replace, a current manager position. Although, SISD is not budgeting for those positions, it will continue to keep the positions open in case of need.
76	Produce management reports by school and use these reports to eliminate duplicative work, increase accountability and productivity, and reduce clerical	In Progress	\$100,800	\$0	\$80,640	The Food Service Department has developed meal per labor hour, meal participation, and work order reports. The Management Information Services and Food Service departments have developed reports

	staff. (p. 334)					that will eliminate duplicate data entries. By December 1998, full automation and reduction of duplicative entry into BiTech will allow the district to reduce a clerical position. Next year, Food Service will be able to connect with vendors so schools can buy groceries directly.
77	Provide job descriptions and training materials for Food Services employees written in other native languages. (p. 336)	Complete	\$0	\$0	\$0	The Food Service Department has implemented this recommendation by using numerous signs provided by the Health Department in Spanish and Vietnamese. Specialists are also encouraged to attend the Texas School Food Service Association class in safety and sanitation that is conducted in Spanish. The Food Service Department, with the assistance of Food Service specialists, staff, other Food Service departments across the U.S. and the National Management Institute, developed flash cards with key job responsibilities in

						Spanish and Vietnamese that help them direct and communicate to their non-English speaking kitchen staff.
78	Formulate a strategy to increase, monitor, and analyze meal participation rates. (p. 340)	Complete	\$1,547,675	\$519,922	\$1,619,792	Meal participation rates are monitored monthly for each school using new reports. The Food Service director met with principals to discuss ways to increase participation and a number of new ideas were tried that resulted in increased participation. The Food Service web page solicits comments from parents and students. A suggestion box will be set up in each cafeteria in 1998-99. SISD won one of only two national "Target Your Market" awards for increased participation. Total increase in participation has been 27.3 percent for breakfast and 14.1 percent for lunch. Also, the ability for parents to prepay meals with credit cards have increased participation. SISD managers are more involved in the

						decision-making process, and principals took the initiative to help boost participation. Snack bar items can now be counted as a reimbursable meal in the secondary schools.
79	Increase participation in breakfast service. (p. 343)	Complete	\$0	\$0	\$0	As the result of presentations at meetings with principals, participation increased by 20 percent, earning the Food Service Department state recognition. Revenues are combined with those shown in Recommendation #78.
80	Purchase and use an approved nutritional analysis computer program to ensure that menus comply with federal guidelines for acceptability, quality, and accuracy. (p.345)	Complete	(\$4,000)	\$0	(\$8,200)	Menus were found to be on target with nutrient standards as the result of a National Management Institute consultant's visit to the district for four days to analyze menus, suggest software and improve menus. The consultant was obtained at no cost to the district by applying for a grant through the Texas Education Agency.
81	Stagger serving	Complete	\$0	\$0	\$0	The National

	times at all schools and consider limiting menu choices in elementary schools. (p. 346)					Management Institute consultant and the Texas School Food Service Association's Standards of Excellence reviewers felt that the program's increase in participation was directly linked to a wide variety of nutritious choices. Food Services worked with principals to stagger serving times, but did not limit menu choices in elementary schools based on the consultant's finding.
82	Analyze recipes to determine actual cost for food and labor. (p. 347)	Complete	\$0	\$0	\$0	This recommendation was implemented in July 1998 by costing out menus. A balance between "quick-to-fix" menu items and traditional cooking methods was put in place to keep labor and food costs in line. New spreadsheets allowed more bids to be awarded.
83	Bring meal equivalents per labor hour in line with industry standards. (p. 349)	Complete	\$0	\$0	\$0	Food Service meals per labor hour are in line with industry standards in school food service in Texas. Improvement is ongoing based on monthly reports

						provided to supervisors. The register report, for example, has helped managers to improve MPLH. The secondary schools also are doing a lot of self-serving during meal times.
84	Implement comprehensive nutrition education plans for students, faculty, and Food Services personnel at each SISD school. (p. 351)	Complete	\$0	\$0	\$0	Comprehensive nutrition education plans were in place for 1997-98. Nutrition videos, models, posters and student promotions were purchased and used throughout the year. Numerous nutrition presentations were given in classrooms and letters were sent to elementary and secondary teachers as well as to PTA/PTO/Booster officers. The district hired a registered dietitian to handle training, and the education program is helping to increase participation.
85	Implement a recycling program for Food Services' solid waste. (p. 353)	Not Implemented	\$0	\$0	\$0	The district only recycles white paper and boxes. However, they are looking at expanding recycling. The better use of paper products and plastic utensils in meal service (i.e. they don't have to

						provide an entire utensil package for cereal when a single spoon is sufficient) has been implemented.
86	Negotiate an exclusive vendor contract for vending machines. (p. 354)	Complete	\$585,838	\$1,552,000	\$2,037,538	The board approved an exclusive, 11-year Sponsorship Agreement with the Pepsi-Cola Company on July 14, 1998. The money is in bank earning interest and will be used sometime in the future on education-related programs. The contract allows for commissions and other incentives for individual schools. SISD is also in the process of developing an request for proposal for its snack machines.
87	Balance vending machine food items with nutritious foods and beverages. (p. 355)	In Progress	\$0	\$0	\$56,145	Vending machine food is currently controlled by the principal and the vendor. Competitive foods, as defined by the Child Nutrition Program, are not sold in the cafeterias. The district is going to include this nutritional product component in the RFP for snack machines.
88	Develon an	Complete	(\$35,000)	(\$7,000)	(\$227,050)	As of Anril 6. 1998.

	integrated plan for preventive maintenance, equipment purchase, and renovation. (p. 356)					Food Service implemented the recommendation. A preventive maintenance calendar of schools to be visited is published for each month of the school year, a spreadsheet of work orders is maintained with cost per repair, and a request for an assistant for the maintenance staff was made for 1998-99. In addition, a five-year plan was approved in January 1998 and a kitchen consultant is developing renovation plans. Equipment will be purchased based on renovation recommendations and in accordance with the five-year plan.
89	Conduct a cost-benefit analysis before converting the warehouse cooler to a freezer. (p. 357)	Complete	\$0	\$0	\$0	The cost-benefit analysis was conducted and the project was determined not to be cost effective. The floor is solid concrete and it needs additional insulation which was determined to be cost-prohibitive.
Chapter 11: Transportation						

90	The Transportation Department should prepare a five-year plan that evaluates the district's changing transportation needs and sets objectives to meet them. (p.365)	Complete	\$0	\$0	\$0	A five-year plan was developed and adopted by the board on July 14, 1998.
91	Consider leasing commercial advertising space on SISD school buses. (p. 366)	Complete	\$400,000	\$0	\$0	Following a thorough study of the issue, the senior staff determined in April 1998 that leasing of commercial advertising space on public school buses could potentially compromise the safety of students, hence this issue will not be pursued further.
92	Regularly assess the cost of non-required transportation programs. (p. 369)	Complete	\$0	\$0	\$0	In the first of a continuing assessment of non-required transportation costs, the Transportation director reported to the superintendent on March 18, 1998 that the district had incurred \$963,687 in costs for non-required transportation programs during the 1996-97 school year.
93	Eliminate the assistant director position and	Not Implemented	\$215,000	\$0	(\$17,040)	During the November 1, 1997 administrative

	create two foreman positions. (p. 370)					reorganization, the decision was made to eliminate the assistant director's position through attrition. Foreman positions will be created when the current assistant director position is eliminated, but the district feels this may not occur for more than five years.
94	Provide salary incentives to encourage mechanics to become certified through the National Institute for Automotive Service Excellence's vehicle technician certification program. (p. 372)	Not Implemented	(\$29,000)	\$0	(\$49,230)	A proposal for implementing this recommendation was developed in March 1998. Funding for that proposal was not included in the 1998-99 budget.
95	Study and revise alternative bell schedules using available computer software. (p. 374)	Not Implemented	\$192,000	\$0	\$0	The district concluded, based on a study, that reducing the number of bell schedules would require more staff members, working on a part-time basis without benefits, and would likely produce a higher turnover rate. In addition, it would cause overcrowding on buses, thereby requiring purchase of more buses.

96	Purchase or lease-purchase a three-brush automatic vehicle wash. (p. 376)	Not Implemented	(\$13,600)	\$0	\$0	After a careful analysis of the overall Transportation Department needs and budget, it was determined that there were greater needs than purchasing or leasing a bus washing facility at an approximate cost of \$100,000.
97	Substitute 87 octane for 93 octane gasoline. (p.377)	Rejected	\$94,000	\$0	\$0	The district operates 37 gasoline vehicles daily that have been tuned to operate on 93-octane gasoline. To change to 87 octane would require readjustment of most carburetors and change in ignition timing. The manuals for those buses do not recommend use of less than 89-octane gasoline. SISD will be turning over these buses soon anyway.
98	Implement and fund a long-term vehicle replacement plan that systematically replaces gasoline-fueled buses with diesel buses. (p. 381)	Complete	(\$1,187,000)	(\$300,000)	(\$1,200,000)	Nine 71-passenger and two 42-passenger wheelchair lift-equipped buses were purchased on June 9, 1998. The board adopted a five-year replacement plan on July 14, 1998.
Chapter 12: Safety and Security						
99	Report police incident activity	Complete	\$0	\$0	\$0	Police incident activity and

	separately from administrative activity. (p. 392)					administrative activity have been coded separately in the computer and will be printed individually upon request and during the publication of the next annual report that is scheduled for release in September 1998.
100	Establish a policy for replacing police vehicles every five years and reduce the fleet to no more than 15 vehicles. (p. 396)	In Progress	(\$281,250)	\$0	(\$200,000)	As of December 5, 1997, three high mileage vehicles had been taken out of service to reduce the fleet to 15. A proposal was submitted in January 1998 for the purchase of replacement vehicles during the 1998-99 school year. SISD plans to replace three cars per year every year for the next five years.
101	SISD should purchase three Macintosh desktop computers for the police officers assigned to the two high schools and the alternative school. (p. 398)	Complete	\$4,325	\$3,501	\$17,501	Computers were purchased in August 1997 in response to TSPR's early findings, but before the TSPR report was issued using end of the year funds from the 1996-97 budget. Having computers saves the police force time and gasoline by not having to leave schools to file reports.

102	SPD should use trained officers to conduct safety and crime prevention studies of each campus on an annual basis. (p. 400)	Complete	\$0	\$0	\$0	Training schedules have been solicited from area police academies (Rice University) and the Texas Department of Public Safety to plan for the training. Crime prevention surveys and studies will be conducted only by certified Crime Prevention officers and a comprehensive annual schedule will be produced once other officers complete their training.
TOTAL			\$4,199,063	\$1,606,294	\$1,691,614	