



LEGISLATIVE BUDGET BOARD

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October 29, 2004

Mr. Ron Peace
Superintendent, Victoria Independent School District

Dear Mr. Peace:

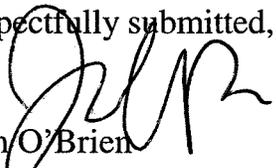
The attached report reviews the management and performance of the Victoria Independent School District's (VISD's) educational, financial, and operational functions.

The report's recommendations will help VISD improve its overall performance as it provides services to students, staff, and community members. The report also highlights model practices and programs being provided by VISD.

The staff of the Legislative Budget Board appreciates the cooperation and assistance that your staff and Gibson Consulting Group, Inc. provided during the preparation of this report.

The report is available on the LBB website at <http://www.lbb.state.tx.us>.

Respectfully submitted,


John O'Brien
Deputy Director
Legislative Budget Board

cc: Bernard T. Klimist
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EXECUTIVE SUMMARY

VICTORIA INDEPENDENT SCHOOL DISTRICT MANAGEMENT AND PERFORMANCE REVIEW

Victoria Independent School District's (VISD's) Board of Trustees requested a management and performance review of the district and paid 25 percent of the \$150,000 cost. The report notes district accomplishments and includes 102 recommendations for improvement. The following executive summary highlights significant accomplishments, findings and recommendations, and provides a general overview of the district. A copy of the full report can be found at www.lbb.state.tx.us.

SIGNIFICANT ACCOMPLISHMENTS

- VISD ensures that legal expenditures are carefully monitored and controlled.
- VISD engaged in partnerships with other educational and governmental institutions in the Victoria area to provide an enhanced wide area network infrastructure for the district.
- VISD provides an ongoing support system for new teachers through its mentoring program.
- VISD collaborates with area business, industry, and civic organizations to enhance student learning in various ways.
- VISD's use of synthetic oil in buses reduces oil and maintenance cost and extends engine life.
- The district maximizes its investment income by closely monitoring short-term variable interest rates.
- The district has taken aggressive steps to contain workers' compensation costs through its return-to-work program.
- VISD has created an internship to provide dietary expertise without additional cost.

SIGNIFICANT FINDINGS

EDUCATION

- VISD lacks the staff to adequately support curriculum development and alignment across grade levels. The lack of district-level staff has hindered the district's ability to respond to declining student performance, especially in mathematics and science at the secondary level.
- VISD's accelerated block-scheduling system negatively affects testing requirements, results in a lack of continuity in sequential classes, and limits student participation in extracurricular activities.
- VISD does not consistently implement effective classroom behavior management techniques,

resulting in a high number of disciplinary incidents and disciplinary alternative education program placements.

- VISD lacks the number and quality of instructional computers to support student learning. Its student-to-computer ratio of six to one is greater than the state recommended ratio of four to one. Fifty percent of the current instructional computers are more than four years old, and some are up to 10 years old.

ORGANIZATION AND PLANNING

- VISD's organizational structure is not logically aligned, with many related functions distributed throughout the organization. This has resulted in a lack of accountability and efficiency in accomplishing district tasks in key areas, including instruction, technology, and safety and security.
- Consolidation of VISD's two high schools into one school with two campuses resulted in overcrowding at one campus and underutilization at the other. The Stroman campus, which serves freshman and sophomores, is at 95.5 percent capacity, while the Senior campus, which serves juniors and seniors, is at 50.4 percent capacity. Ideal utilization rates for secondary schools range from 70 to 85 percent.
- VISD has not completed a comprehensive adjustment of school attendance zones, resulting in the underutilization of many of its schools. Most elementary campuses are operated at low capacity levels which costs the district extra dollars in utilities, maintenance, insurance, and staffing.
- VISD does not effectively manage the safety and security needs of its schools. Safety and security functions are decentralized, and some duties essential to the management of a successful safety and security program are being neglected.
- The prolonged VISD debate over whether to accept the consolidation of the two high schools or reconfigure the high school has divided the community and negatively affected constituent morale.
- VISD's strategic planning process is not well-organized, focused, or based on data. The district board and staff have expended energy and resources into developing a strategic plan but have been unable to move forward with completing and implementing the plan.

- VISD's bus replacement guidelines do not adequately provide for the timely replacement of buses, nor does the district have an adopted bus replacement plan, which has resulted in more than 30 percent of the fleet being 15 or more years old. Using VISD's current replacement schedule, 50 percent of the fleet will be 15 or more years old by 2007–08.
- VISD lacks centralized and comprehensive contract management policies and procedures, which places the district at risk for abuse by vendors, contractors, and district personnel.

FINANCE AND BUDGETING

- VISD's Maintenance and Operations (M&O) tax rate is less than the rate that maximizes state funding. By not maximizing Tier 2 funding, the district has not taken advantage of state and local funds to address some of its unmet needs, such as adequate employee compensation and facilities maintenance.
- VISD has not defined an acceptable level of risk for its self-funded health care plan. It has been unsuccessful in developing effective strategies to respond to escalating health care costs, making it vulnerable to being unable to fully fund claims.

COMPENSATION AND STAFFING

- Historically, VISD has not offered competitive salaries, making it difficult for the district to attract and retain high quality staff. While VISD gave a significant salary increase in 2004–05, staff salaries remain below the peer average.
- VISD's staffing standards for campus leadership positions are not consistent with those established by the regional accrediting association. Compared to the standards, all the elementary schools are overstaffed, while the high school is understaffed.
- VISD does not use staffing formulas for non-instructional positions and is overstaffed in clerical positions.
- VISD lacks a well-defined maintenance staffing standard resulting in overstaffing compared to established standards and unnecessary costs to the district.
- VISD is overstaffed in custodial operations. Its internal standards are not consistent with industry standards. Furthermore, the scheduling of workers contributes to inefficiency in staffing.

SIGNIFICANT RECOMMENDATIONS

EDUCATION

- **Recommendation: Create a curriculum coordinator position with expertise in secondary education, mathematics, and science.** A curriculum coordinator with expertise in secondary education, mathematics, and science can help the district improve student performance at the secondary level.
- **Recommendation: Change the accelerated block schedule to a traditional seven periods with a zero-hour option schedule.** A traditional seven-period schedule will better meet student needs, while the zero-hour option will allow students the flexibility to take an eighth class before the start of the regular school day. A traditional schedule will result in continuity of sequential classes and make it easier for students to participate in more than one extracurricular activity at a time. This schedule will also improve coordination with the Career Development School (CDS) and make it easier for students transitioning in and out of the district.
- **Recommendation: Require all teachers to participate in classroom behavior management training and use discipline referral data to schedule follow-up skill building as needed.** By ensuring that all teachers have the skills to effectively manage their classrooms, the district will increase student engagement in learning and reduce student misbehavior.
- **Recommendation: Purchase instructional computers to meet the state standards for student-to-computer ratios and implement a replacement plan for all the district's older computers.** Purchasing instructional computers and implementing a computer replacement plan will bring VISD up to state standards and improve instruction.

ORGANIZATION AND PLANNING

- **Recommendation: Restructure the district's organization and replace the assistant superintendent positions with a deputy superintendent to strengthen accountability and efficiency.** Under the new organization, the deputy superintendent will be responsible for all instructional and student services. The Chief Financial Officer will oversee Finance and Accounting, Purchasing and Warehousing, Child Nutrition and Transportation. Plant Maintenance, Human Resources, Technology and Communications will report directly to the superintendent. By restructuring its organization,

VISD will improve its educational services and make its operational areas more accountable and efficient.

- **Recommendation: Develop a short-term plan to alleviate overcrowding at the Stroman High School Campus.** Three options to provide a short-term solution are: construct an additional stairwell to ease traffic flow of students between classes; convert Stroman into a ninth grade center and transfer tenth graders to the Senior Campus; or place additional portable buildings at the Stroman Campus. The most conservative approach, relocation of portables to the Stroman Campus, will reduce the campus utilization rate from 95.5 percent to 85 percent.
- **Recommendation: Close three elementary schools and adjust the attendance zones to achieve an optimum efficiency factor rate of 90 to 95 percent in the remaining 12 elementary schools.** Closing three schools will increase space utilization, reduce maintenance and custodial requirements, cut utility expenses, and eliminate salaries and benefits for non-instructional positions. Closing the schools and consolidating enrollment in the remaining schools will allow the district to reallocate resources to other needs.
- **Recommendation: Hire a chief of police for the district and additional security guards for the middle schools.** A chief of police will help VISD more effectively manage the safety and security needs of the district. The police chief will be able to analyze the number and severity of incidents per school to determine staffing needs, address vandalism problems in the district, supervise the security guards, oversee the School Resource Officers, and monitor and apply appropriate practices to handle disciplinary and truancy issues. The additional security guards will meet the needs of the middle schools that currently lack these services.
- **Recommendation: Create an ongoing community planning committee to engage the community and district in mutual educational improvement goals.** A community planning committee will help heal the wounds caused by the consolidation of the two high schools and reengage the community in improving the district's schools.
- **Recommendation: Create a unit in VISD to coordinate and oversee the strategic planning process and ensure that it is linked to the district's evaluation and staff development functions.** A position to oversee the strategic planning process will ensure that the process is

well-organized, focused, and based on data and that the district stays focused on meeting its instructional and operational needs.

- **Recommendation: Adopt a school bus replacement policy based on age or mileage or a combination of both.** Replacement of the aging fleet will result in more efficient, safer buses.
- **Recommendation: Centralize contract management and develop comprehensive written policies and procedures to manage and monitor all contracts through the Purchasing Department.** The district should develop standards, such as dollar limits on contract legal review; a list of individuals who can obligate the district with corresponding limits of authority; and step-by-step instructions on how the contracting process works. Additionally, the Purchasing Department should manage all contracts to ensure that they are compliant with all terms and conditions as well as all policies and procedures. These practices will help protect the district from potential abuse from vendors, contractors, and district personnel.

FINANCE AND BUDGETING

- **Recommendation: The district should evaluate the proposed M&O tax rate in terms of Tier 2 funding from the state.** The board should recognize the effect of adopting a tax rate in terms of Tier 2 funding. Adopting a rate lower than the rate needed to maximize state funding results in lost revenue to the district in both local taxes and state funding. If VISD had maximized Tier 2 funding from 1998-99 through 2003-04, an additional \$5.9 million would have been drawn from the state treasury. The combination of additional state and local revenue would have provided the district with the funds to address some of the district's needs for additional instructional computers, bus replacement, and competitive salaries.
- **Recommendation: Determine and define as policy an acceptable level of risk for operation of a self-funded health care plan.** The district should research and identify methods to keep the self-funded plan solvent, join the TRS ActiveCare plan, and/or conduct an expanded market search for private insurers willing to offer a traditional health insurance product to the district. Opportunities to reduce healthcare costs may include partnering with other public entities to raise buying power and implementing disease management programs.

COMPENSATION AND STAFFING

- **Recommendation: Phase in salary adjustments for all staff categories in order to effectively recruit and retain highly qualified staff and annually evaluate district salaries against peer districts.** By increasing salaries, VISD will be in a stronger position to compete for highly qualified staff. It should remain competitive by annually comparing its salaries to peer districts and making adjustments as needed.
- **Recommendation: Develop and implement staffing standards for VISD campus administrators.** By adopting the widely accepted Southern Association of Colleges and Schools (SACS) standards, VISD can more efficiently staff its schools with principals and assistant principals.
- **Recommendation: Adopt the Southern Association of Colleges and Schools staffing standards for campus clerks and develop staffing standards for non-instructional staff.** By using staffing standards for all non-instructional staff, VISD can ensure that it is staffed based on district needs. Staffing standards provide guidance for increases and decreases in staff based on enrollment and other factors, and help districts operate efficiently.
- **Recommendation: Develop staffing formulas and reduce maintenance staffing.** The district should develop staffing formulas for its maintenance workers based on industry standards, such as those developed by the Association of Physical Plant Administrators (APPA). By using set standards, VISD can improve efficiency and reduce costs.
- **Recommendation: Revise custodial staffing formulas and develop more efficient work schedules.** The district should develop staffing formulas based on industry standards and reduce staff accordingly. Through reducing staff and revising custodial work schedules, VISD will improve efficiency.

GENERAL INFORMATION

- Victoria ISD covers approximately 605 square miles and is located in the “Golden Crescent” of Texas, surrounded by Houston, Austin, San Antonio, and Corpus Christi.
- The district’s enrollment has decreased by 2.3 percent over the last five years.
- In 2003-04, VISD employed 2,123.8 full time equivalents (FTEs), including 969.7 teachers.

- VISD’s schools and administrative and support facilities encompass a total capacity of 2 million square feet.
- Based on the passing criteria identified by the Texas Education Agency (TEA) for the 2002-03 statewide assessment, VISD scored 64.8 percent, compared to the state average of 69.1 percent.
- The Texas Education Agency (TEA) rated VISD as ‘Academically Acceptable’ in 2003–04. Nine of the district’s elementary schools achieved a Recognized rating and all the secondary schools were Academically Acceptable.
- VISD is served by the Education Service Center Region VI.
- VISD consolidated its two high schools into one school with two campuses (a ninth and tenth grade campus and an eleventh and twelfth grade campus). This consolidation has resulted in overcrowding at one school and underutilization at the other, and remains an issue that divides the community.
- In August 2004, the board approved a significant pay increase for all employees without determining how the district would pay for the salary increase.
- Senator Kenneth L. Armbrister and Representative Geanie Morrison represent the Victoria ISD geographical area.

SCHOOLS

- Fifteen elementary schools
- Three middle schools
- Three high schools (1 regular and 2 alternative)

ALTERNATIVE EDUCATION PROGRAMS

- Mitchell Guidance Center, the district’s alternative education program
- Profit Academic Center for Success, school of choice for high school students at risk of dropping out

2003-04 STUDENT DATA

- 14,316 students enrolled
- 53 percent Hispanic
- 37.4 percent White
- 8.4 percent African American
- 0.3 percent Native American
- 0.9 percent Asian/Pacific Islander
- 53 percent economically disadvantaged

2003–04 FINANCIAL DATA

- Total budgeted expenditures: \$89,982,427
- Fund Balance: 15 percent of 2002-03 budgeted expenditures
- The total 2003 tax rate: \$1.5535 (\$1.456 Maintenance and Operations and \$0.0975 Interest and Sinking). The recently adopted total tax rate for 2004 remains at \$1.5535.

2003–04 PERCENT SPENT ON INSTRUCTION

- Of the total budgeted expenditures, VISD spent 55.1 percent on instruction, which is higher than the state average of 50.4 percent. Looking at operating expenditures only (excluding debt service and bond repayment), VISD spent 58.5 percent on instruction, which is higher than the state average of 56.6 percent.

The chapters that follow contain a summary of the district’s accomplishments, findings and numbered recommendations. Detailed explanations for accomplishments and findings/recommendations follow the summary and include fiscal impacts. Each recommendation also lists the page number that corresponds to its detailed explanation.

At the end of the chapters, a page number reference identifies where additional general information for that chapter’s topic is available. Each chapter concludes with a fiscal impact chart listing the chapter’s recommendations and associated savings or costs for 2004–05 through 2008–09.

Following the chapters are the appendices, that contain general information, comments from the Community Open House and focus groups, and the results of the district and parent surveys conducted by the review team.

The table below summarizes the fiscal impact of all 102 recommendations contained in the report.

FISCAL IMPACT

	2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
Gross Savings	\$1,247,588	\$5,154,021	\$5,163,454	\$5,355,058	\$5,392,943	\$22,313,064	\$2,157
Gross Costs	(\$1,508,064)	(\$4,013,201)	(\$4,506,088)	(\$4,910,151)	(\$5,180,816)	(\$20,118,320)	(\$435,323)
Total	(\$260,476)	\$1,140,820	\$657,366	\$444,907	\$212,127	\$2,194,744	(\$433,166)

CHAPTER 1

EDUCATIONAL SERVICE DELIVERY

Effective educational service delivery requires appropriate instructional guidance, capable teachers, adequate resources, and a thorough understanding of students' instructional needs.

VISD serves its students in 21 schools: 15 elementary schools, 3 middle schools, and 3 high schools. Memorial High School (MHS) is split into two campuses: Stroman campus serves ninth and tenth grade students and the Senior campus serves eleventh and twelfth grade students. Two of the three high schools are alternative campuses, one is the disciplinary alternative education center and the other is a school of choice. The schools include six elementary school magnet schools and one middle school magnet school.

The Texas Education Agency (TEA) annually provides comprehensive information on the Texas Assessment of Knowledge and Skills (TAKS) results as well as other demographic, staffing, and financial data to school districts and the public through its Academic Excellence Indicator System (AEIS) and its Public Education Information Management System (PEIMS). This chapter uses the latest available data.

VISD is located in Regional Education Service Center III (Region 3). VISD's peer districts used for comparative purposes: Bryan, Lamar Consolidated, Tyler, and Wichita Falls.

In 2003-04, the student enrollment in the district was 14,316. and the student population was predominantly Hispanic, at 53 percent, followed by Whites at 37.4 percent and African Americans at 8.4 percent. Its percentage of economically disadvantaged students, at 53 percent, was just above the state average of 52.8 percent.

FINDINGS

- VISD lacks the staff to adequately support curriculum development. The lack of staff has hindered the district's ability to respond to declining student performance, especially at the secondary level.
- VISD's accelerated block-scheduling system negatively affects testing requirements, results in a lack of continuity in sequential classes, and limits student participation in extracurricular activities.
- VISD does not consistently implement effective classroom behavior management techniques, resulting in a high number of disciplinary

incidents and disciplinary alternative education program placements.

- VISD identifies very few students as gifted and talented and, in particular, under-identifies elementary and minority students.
- VISD has not ensured that career and technology courses are staying current with student interests and job market needs.
- VISD does not ensure that students placed at the disciplinary alternative education center stay current with their regular classroom assignments.
- VISD does not have a defined strategy for recruiting students into advanced placement (AP) classes, resulting in low numbers of student enrollees in these courses.
- Some VISD schools do not have the number of librarians they need to facilitate student learning.
- Many VISD school library collections do not meet minimum standards.
- VISD's part-time Health Services coordinator lacks the time to effectively complete the duties required of the position.
- VISD's student-to-nurse ratio does not meet national and state standards for ensuring that students have access to needed health services.
- VISD counselors lack time to spend in direct counseling and guidance curriculum services, as required by state law.
- VISD has invested in developing distance-learning technology, but is not effectively using its capacity.
- VISD does not have standards for purchasing instructional technology software.
- The ethnic makeup of VISD's cheerleading and the dance/drill team does not reflect the make-up of the district.

RECOMMENDATIONS

- **Recommendation 1 (p. 3): Create a curriculum coordinator position with expertise in secondary education, mathematics, and science.** A curriculum coordinator with expertise in the aforementioned subjects can help the district improve student performance at the secondary level.

- **Recommendation 2 (p. 5): Change the accelerated block schedule to a traditional seven period schedule with a zero-hour option.** The district's block scheduling system negatively affects testing requirements, results in a lack of continuity in sequential classes, and makes it difficult for students to participate in more than one extracurricular activity. By converting to a traditional seven-period schedule, the district will better meet student needs.
- **Recommendation 3 (p. 8): Require all teachers to participate in classroom behavior management training and use discipline referral data to schedule follow-up skill building training as needed.** By implementing effective and positive discipline techniques, teachers will reduce the number of discipline referrals and keep more students engaged in learning.
- **Recommendation 4 (p. 9): Revise the identification process for the Gifted and Talented Program to make it more sensitive in identifying elementary and minority students.** VISD should closely examine the processes it uses to identify children eligible for the GT program and adopt assessment practices that will result in more adequate identification of elementary and minority children.
- **Recommendation 5 (p. 12): Review all Career and Technology Education courses and eliminate those with consistently low enrollment and that are not in demand in the current job market.** The district should establish a committee including business and higher education representatives to help with the review process.
- **Recommendation 6 (p. 14): Ensure that all students placed at the disciplinary alternative education center stay current with their regular classroom assignments.** By keeping students caught up with schoolwork, the district will help ensure that students make a smooth transition back into the regular classroom.
- **Recommendation 7 (p. 15): Award advanced placement (AP) teachers a monetary incentive for every student they teach who takes an AP exam and scores a three or higher.** Monetary incentives will serve as an incentive for teachers to encourage students to enroll in advanced placement classes and take the exams for college credit.
- **Recommendation 8 (p. 17): Hire 5.2 additional librarians and 6.5 library aides and implement staffing standards consistent with the Texas State Library and Archives Commission.** The additional library staff will benefit students and bring the staffing levels up to state-recommended minimum standards.
- **Recommendation 9 (p. 18): Redistribute library holdings and purchase additional books and periodicals to meet state-recommended standards.** By purchasing additional library materials and redistributing library holdings, VISD will ensure that all students have access to adequate reading material.
- **Recommendation 10 (p. 19): Make the Health Services coordinator position full-time and hire a full-time licensed vocational nurse to provide services to the Career Guidance Center and Profit Academic Center.** This give the Health Services coordinator the time to accomplish the duties required of the position.
- **Recommendation 11 (p. 20): Hire five additional licensed vocational nurses, one for each of the three middle schools and two for the Memorial High School campuses, to ensure all students have adequate access to a nurse.** Team each elementary licensed vocational nurse with a registered nurse wherever possible.
- **Recommendation 12 (p. 20): Adopt a policy on the appropriate use of counselor time to increase the time counselors spend in curriculum guidance services and direct contact with students.** This will ensure that counselors are allowed to focus their energy on services that directly benefit students.
- **Recommendation 13 (p. 22): Increase the use of distance learning capabilities to expand curricular offerings to students.** VISD can use its distance learning capacity to provide dual high school/college credit courses cost-effectively.
- **Recommendation 14 (p. 22): Develop district-wide standards for purchases of instructional software products.** This will reduce duplication purchases and ensure that all software purchases are compatible with existing district technology.
- **Recommendation 15 (p. 22): Develop specific policies and procedures that encourage equity in cheerleading and**

drill/dance team participation. VISD should reduce the costs of participating in cheerleading and the drill/dance team in an effort to be more inclusive of all VISD students.

DETAILED FINDINGS

CURRICULUM SUPPORT (REC. 1)

VISD lacks the staff to ensure that curriculum is well developed and vertically aligned, leaving the district at a disadvantage in improving student performance. The Curriculum director is solely responsible for curriculum alignment. Volunteer teachers and principals serve on curriculum design committees for their schools. The lack of central administrative curriculum staff has limited the district's ability to adequately respond to declining student performance, especially at the secondary level.

While the TAKS pass rates for VISD student groups are about 80 percent at the elementary level, the pass rates begin to decline in middle school and continue to drop through high school. In 2002–03, students in grade 7 had a 63.8 percent pass rate, which declined to a low of 34.8 percent by grade 11. While a drop in TAKS pass rates at the secondary level is reflective of the state as a whole, VISD's pass rates are lower than the state and peer group rates. **Exhibit 1–1** compares VISD's 2002–03 TAKS pass rates for all

students as well as by student group to its peers and the state. The percentage of VISD Hispanic and White students that passed all the tests was lower than any of its peers and the state. Pass rates for African American and economically disadvantaged students were the second lowest.

While VISD performed well on the TAKS at the elementary level, its TAKS pass rates at the secondary level were lower than the state averages. **Exhibit 1–2** compares VISD 2003–04 TAKS scores to the state's scores by grade level and subject area.

Exhibit 1–3 compares VISD's 2002–03 TAKS reading/English scores to its peer districts by grade level. In general, the districts had lower TAKS pass rates at the secondary level.

In 2002–03, VISD's pass rates on the TAKS in mathematics were below its peers in grades 7 through 11. **Exhibit 1–4** shows VISD's mathematics pass rates dropped more from grade 3 to grade 11 than any peer district.

The percentage of VISD students in grades 7 through 11 who passed all portions of the TAKS was lower than the peer districts. Also, VISD's pass rates in this category declined to a greater degree from grades 3 to 11 than any of its peers (**Exhibit 1–5**).

**EXHIBIT 1–1
TAKS PASS RATES FOR ALL TESTS,
SUM OF GRADES 3 THROUGH 10 BY STUDENT GROUP
VISD, PEER DISTRICTS, AND THE STATE
2002–03**

DISTRICT	ALL STUDENTS	AFRICAN AMERICAN	HISPANIC	WHITE	ECONOMICALLY DISADVANTAGED
Wichita Falls	73.2%	54.3%	61.0%	81.2%	61.5%
Lamar Consolidated	70.8%	58.1%	61.1%	85.8%	57.9%
Tyler	68.0%	57.5%	60.8%	83.6%	59.1%
Bryan	64.8%	47.7%	56.2%	82.6%	52.8%
Victoria	64.8%	53.4%	56.0%	78.1%	56.9%
State	69.1%	55.0%	59.8%	81.4%	58.1%

SOURCE: Texas Education Agency, Academic Education Information System (AEIS), 2002–03.

**EXHIBIT 1-2
VISD AND STATE TAKS PASS RATES BY GRADE LEVEL
2003–04**

GRADE LEVEL	READING/ ENGLISH		MATHEMATICS		SCIENCE		SOCIAL STUDIES		WRITING	
	VISD	STATE	VISD	STATE	VISD	STATE	VISD	STATE	VISD	STATE
3	96%	94%	92%	90%	n/a	n/a	n/a	n/a	n/a	n/a
4	86%	85%	87%	86%	n/a	n/a	n/a	n/a	92%	90%
5	83%	79%	86%	82%	74%	69%	n/a	n/a	n/a	n/a
6	84%	86%	72%	77%	n/a	n/a	n/a	n/a	n/a	n/a
7	85%	83%	67%	70%	n/a	n/a	n/a	n/a	92%	91%
8	88%	89%	60%	66%	n/a	n/a	82%	88%	n/a	n/a
9	79%	84%	42%	59%	n/a	n/a	n/a	n/a	n/a	n/a
10	61%	75%	56%	63%	59%	64%	81%	87%	n/a	n/a
11	78%	87%	78%	85%	84%	85%	96%	97%	n/a	n/a

SOURCES: Texas Education Agency, Public Education Information Management System (PEIMS), 2003–04; VISD director of Testing and Evaluation.
NOTE: N/A means the test was not given in these grades.

EXHIBIT 1-3
VISD AND PEER DISTRICTS
TAKS READING/ENGLISH PASS RATES BY GRADE LEVEL
2002-03

GRADE LEVEL	VICTORIA	BRYAN	LAMAR	TYLER	WICHITA FALLS
3	91.3%	90.7%	92.9%	92.3%	92.1%
4	88.0%	81.7%	90.6%	90.5%	87.0%
5	83.6%	76.4%	82.9%	83.5%	81.9%
6	86.5%	81.1%	88.7%	85.5%	92.6%
7	86.4%	86.2%	90.9%	89.6%	87.3%
8	87.7%	85.9%	88.7%	87.6%	90.6%
9	78.2%	69.4%	77.6%	78.1%	85.0%
10	68.6%	64.8%	69.6%	65.0%	76.4%
11	57.3%	53.5%	58.8%	65.2%	70.3%

SOURCE: Texas Education Agency, AEIS, 2002-03

EXHIBIT 1-4
VISD AND PEER DISTRICTS
TAKS MATHEMATICS PASS RATES BY GRADE LEVEL
2002-03

GRADE LEVEL	VICTORIA	BRYAN	LAMAR	TYLER	WICHITA FALLS
3	93.3%	88.7%	94.1%	90.7%	90.5%
4	88.7%	82.5%	94.2%	90.3%	89.0%
5	91.1%	82.6%	91.2%	90.6%	88.4%
6	76.7%	77.0%	82.0%	75.2%	90.2%
7	67.7%	70.7%	76.8%	76.2%	78.4%
8	64.5%	68.5%	73.5%	76.1%	79.9%
9	50.9%	60.2%	56.4%	58.4%	63.5%
10	64.9%	72.3%	72.7%	69.8%	72.5%
11	54.3%	72.7%	66.7%	62.6%	65.6%

SOURCE: Texas Education Agency, AEIS, 2002-03.

EXHIBIT 1-5
VISD AND PEER DISTRICTS TAKS
ALL TESTS PASS RATES BY GRADE LEVEL
2002-03

GRADE LEVEL	VICTORIA	BRYAN	LAMAR	TYLER	WICHITA FALLS
3	87.2%	84.5%	89.9%	86.2%	85.7%
4	77.1%	67.5%	83.0%	81.0%	76.9%
5	65.9%	64.2%	70.5%	66.9%	71.8%
6	72.8%	72.0%	78.4%	70.8%	87.0%
7	63.8%	64.8%	72.4%	70.0%	72.6%
8	61.3%	65.6%	70.4%	72.0%	77.7%
9	49.4%	52.9%	52.7%	54.9%	61.6%
10	43.3%	48.2%	50.4%	44.4%	54.0%
11	34.8%	45.9%	43.4%	45.9%	46.7%

SOURCE: Texas Education Agency, AEIS, 2002-03.

VISD is also doing poorly in the percentage of students who take college entrance exams compared to its peers and the state average. **Exhibit 1-6** shows that, in 2002, 41.6 percent of VISD students took either the SAT or ACT, compared to a 61.9 percent state average and a 55.6 percent regional average. VISD had a lower percentage of students taking college entrance for both 2001 and 2002 than any of its peers, the state, and Region 3.

Exhibit 1-7 shows the graduation rates for VISD compared to its peers by student group. VISD had the lowest graduation rate for all students and economically disadvantaged students; the second

lowest graduation rate for Hispanic students; the third lowest graduation rate for White students; and the second highest graduation rate for African American students.

Research into best practices for improving student performance shows that many public schools have coordinator positions in central administration to assist with curriculum. These positions are responsible for the design of curriculum and the development of corrective action plans for both students and teachers to improve student performance. Many districts are employing individuals with math and science backgrounds due

**EXHIBIT 1-6
PERCENT OF STUDENTS TAKING SAT/ACT
VICTORIA ISD, PEER SCHOOL DISTRICTS, REGION 3, AND THE STATE
2000-01 AND 2001-02**

DISTRICT	2002	2001
Wichita Falls ISD	59.5%	59.8%
Lamar CISD	59.3%	56.5%
Tyler ISD	52.1%	55.2%
Bryan ISD	48.7%	53.9%
Victoria ISD	41.6%	47.4%
Region 3	55.6%	56.6%
State	61.9%	62.9%

SOURCE: Texas Education Agency, AEIS, 2002-03.

**EXHIBIT 1-7
GRADUATION RATES BY STUDENT GROUP
VISD, PEER DISTRICTS, AND THE STATE
2001-02**

DISTRICT	ALL STUDENTS	AFRICAN AMERICAN	HISPANIC	WHITE	ECONOMICALLY DISADVANTAGED
Wichita Falls	85.0%	86.7%	79.2%	85.7%	79.0%
Tyler	80.9%	78.3%	64.1%	90.1%	72.8%
Bryan	80.9%	78.0%	76.5%	84.1%	73.4%
Lamar Consolidated	80.5%	77.3%	72.1%	89.6%	73.4%
Victoria	79.5%	80.8%	68.6%	88.1%	67.9%
State	82.8%	79.8%	75.7%	88.2%	75.8%

SOURCE: Texas Education Agency, AEIS, 2002-03.

to the large number of students scoring poorly on the math and science standardized tests.

A review of VISD’s peer districts shows that many of them have support positions to improve student performance. Lamar Consolidated ISD, Tyler ISD, and Bryan ISD all have positions that assist with curriculum design. In each of these districts, these positions report to the director of Curriculum. **Exhibit 1-8** compares VISD’s curriculum staffing effort to those of its peers.

VISD should hire a coordinator with expertise in secondary education, mathematics, and science to assist the director of Curriculum with developing and aligning curriculum to better prepare all students for educational success.

The fiscal impact of this recommendation, based on the average salary for VISD coordinators in the Curriculum Department, is \$58,232. This estimate includes variable benefits of 2.8 percent and fixed

benefits of \$2,700 annually ($[\$54,019 \times 1.028] + \$2,700$). The first year costs are prorated to \$38,821 ($[\$58,232 / 12] \times 8$) based on an estimated implementation date of January 2005.

BLOCK SCHEDULING (REC. 2)

VISD’s accelerated block scheduling system is not adequately meeting student needs. It interferes with testing requirements, results in a lack of continuity in academic sequential classes, and does not allow for students to participate in more than one extracurricular activity at a time. This schedule also makes it difficult for students taking courses at the Career Development School (CDS) and for students transferring to or from the district.

An accelerated block schedule divides the school day into four instructional blocks of approximately ninety minutes each and the school year into two semesters. Students take four courses per semester for a total of eight classes per year. A typical VISD

**EXHIBIT 1-8
COMPARISON OF CURRICULUM POSITIONS
VISD AND PEER DISTRICTS**

DISTRICT	ENROLLMENT	NO. OF CURRICULUM SUPPORT POSITIONS
Lamar CISD	17,724	4 Curriculum specialists reporting to the executive director of Curriculum; also has executive director of Elementary Education and executive director of Secondary Education
Tyler ISD	17,273	1 Curriculum coordinator reporting to a director of Curriculum; also has a director of Elementary Education and a director of Secondary Education
Wichita Falls ISD	15,035	No response to peer survey
Victoria ISD	14,316	1 Curriculum director
Bryan ISD	14,104	4 Learning facilitators reporting to various executive director positions in the Instructional Services Department

SOURCE: Texas Education Agency, PEIMS, 2003-04 and district responses to peer surveys.

teacher’s schedule is to teach three courses and have one block as a planning period each semester. VISD adopted this schedule for its high school in 1994-95. Exhibit 1–9 displays an accelerated block schedule.

**EXHIBIT 1-9
ACCELERATED 4 X 4 BLOCK
SCHEDULE**

PERIOD	SEMESTER 1	SEMESTER 2
1	Course 1	Course 5
2		
3	Course 2	Course 6
4		
5	Course 3	Course 7
6		
7	Course 4	Course 8
8		

SOURCE: Texas Education Agency, Block Scheduling in Texas Public High Schools, 1999.

This schedule interferes with state testing requirements in that students may take the TAKS during a semester when they are receiving no related subject area instruction. This issue is especially critical given the district’s poor performance on the TAKS at the high school level.

It also interferes with the timing of Advanced Placement (AP) exams. The exams are administered in May, so some students take AP exams an entire semester after completing the related courses. For example, in 2003–04, only 59 percent of the students who took AP exams were enrolled in a corresponding course that semester.

Another issue is that the accelerated block schedule forces students to take sequential academic courses at least one semester apart. Teachers spend more

time reviewing the prerequisite material than if related courses were offered sequentially. For example, Algebra I is a prerequisite for Geometry, yet some students are scheduled to take Algebra I during their first semester of grade 9 and Geometry during their second semester of grade 10. Exhibit 1–10 shows the number and percentage of students taking courses in mathematics and foreign languages at least one semester apart from 2002-03 to 2003-04. One-third to one-half of the students take math or foreign language sequential courses more than one semester apart.

The accelerated block schedule also makes it difficult for students to participate in more than one extracurricular or “co-curricular” activity per semester. The TEA defines “co-curricular activities” as those which are not essential to instruction but enhance the curriculum, including University Interscholastic League (UIL) competitions, such as one-act plays, speech, debate, and band, among others. Extracurricular activities are those that do not enhance the instructional program, including athletics, and generally involve competition between or within schools as well as related activities (such as drill team and cheerleading) that exist because of athletics. The director of Athletics stated that coaches, band directors, and choir directors requested that students sign up for their extracurricular/co-curricular courses both semesters to provide continuity in instruction. A student who participates in both a sport and choir would need to devote two out of four periods a day to his or her extracurricular activities, leaving only two periods a semester for academics.

**EXHIBIT 1-10
NUMBER AND PERCENT OF STUDENTS TAKING
SEQUENTIAL MATHEMATICS AND FOREIGN LANGUAGE
COURSES AT LEAST ONE SEMESTER APART
2002-03 AND 2003-04**

COURSE	2002-03		2003-04	
	NUMBER	PERCENT	NUMBER	PERCENT
Geometry	347	30.0%	377	34.7%
Algebra II	399	52.0%	451	75.9%
Pre-Calculus	162	56.1%	142	55.5%
Calculus	52	47.7%	55	52.4%
French II	25	33.3%	26	31.0%
French III	6	19.4%	8	32.0%
French IV	0	0.0%	*	75.0%
German II	25	44.6%	21	35.6%
German III	11	100.0%	7	77.8%
German IV	*	100.0%	0	0.0%
Spanish II	42	5.5%	111	14.1%
Spanish III	91	41.9%	89	43.0%
Spanish IV	11	68.8%	20	80.0%
Latin II	22	27.8%	17	27.0%
Latin III	11	73.3%	17	70.8%
Latin IV	*	100.0%	*	100.0%

SOURCE: VISD PEIMS coordinator, April 2004.

NOTE: * These data were masked due to privacy laws.

The use of the accelerated block also cuts into the class time of students traveling from their home campuses to the Career Development School (CDS). The CDS cuts its class time at the beginning and end to allow for student travel time. When the district was on a traditional seven period schedule, each CDS course met for two class periods and the travel time was made up during the passing period. The CDS also loses Carl Perkins Grant funding for students enrolled in the spring semester but not the fall semester.

In addition, block scheduling interferes with coordinating transfers in and out of the district. Administrators stated that students who transfer into the district from a district using a traditional or A/B block schedule are at a disadvantage in VISD. For instance, a student would receive no credit for having completed a semester of algebra and would need to retake the entire course. Many more schools in Texas are on traditional or A/B block schedules than accelerated block schedules.

VISD’s accelerated block schedule also results in a loss of the state funds allocated to districts based on average daily attendance (ADA). The schedule allows students to accumulate the 24 hours required to graduate in seven semesters, so students often graduate a semester early. For the past few years, an average of 225 VISD students have graduated early. ADA is calculated using the enrollment submitted in October and the average daily attendance submitted at the end of the school year. Students who graduate mid-year are not counted in the enrollment figure and lower the ADA because of their absence in the second semester of school. **Exhibit 1-11** shows the number of students who graduated early in VISD from 2002 through 2004. Six graduated one year early and all of the others graduated one semester early.

The district formed a task force to review the high school schedule in 2003–04. The task force brainstormed and ranked dilemmas caused by the current high school schedule. Three dilemmas were ranked higher than the others: students were not in a corresponding class when testing for the TAKS and

AP for a particular subject; the schedule does not provide for remediation; and all TAKS scores were below the state scores except one.

The district should adopt a traditional seven period schedule with a zero-hour option beginning in 2005-06. A zero-hour option is a class that meets before the first traditional class period and will allow those students who want to earn eight credits a year to continue to do so. To keep the community informed, the district should hold several informational meetings in various locations. The district should also develop a question and answer document and update it on a biweekly basis on the VISD web site.

By converting to a seven-period schedule, the district will be able to eliminate 32 teaching positions at the high school, resulting in an annual savings of \$1,103,680 (32 positions x \$34,490 salary plus benefits). The lowest range of the salary scale for teachers is \$30,924. Calculating variable benefits of 2.8 percent and fixed benefits of \$2,700 annually amounts to \$34,490 ($[\$30,924 \times 1.028 \text{ variable benefits}] + \$2,700 \text{ fixed benefits}$).

The reduction in the number of teaching positions is calculated by subtracting the number of teachers required to teach six of seven periods from the number of teachers required to teach six of eight periods ($259 - 227 = 32$). The district had 259 teaching positions in 2003–04, and each teacher taught the equivalent of six of eight periods each day. The number of teachers required to teach six of seven periods is calculated by multiplying the number of students by the number of periods scheduled, dividing by the average class size, and then dividing by the number of periods taught by each teacher ($3,881 \text{ students} \times \text{seven periods} / 20 \text{ students per class} / 6 \text{ periods taught} = 226.4$). The average class size was calculated by multiplying the number of students by the number of periods scheduled, dividing by the number of periods taught, and dividing by the number of teaching positions ($3,881 \text{ students} \times \text{eight periods scheduled} / \text{six periods taught} / 259 \text{ teachers} = 20$).

In addition to the amount saved on teachers’ salaries, ADA will be increased because there will be fewer

**EXHIBIT 1-11
NUMBER AND PERCENT (BY TOTAL HIGH SCHOOL ENROLLMENT AND GRADE 12 ENROLLMENT) VISD STUDENTS GRADUATING AT LEAST ONE SEMESTER EARLY 2002 THROUGH 2004**

YEAR	NUMBER	PERCENT TOTAL	PERCENT GRADE 12
2002	223	4.9%	31.9%
2003	255	5.7%	33.5%
2004	224	5.4%	29.2%

SOURCES: Texas Education Agency, AEIS, 2002-03, PEIMS 2003-04; VISD PEIMS coordinator, April 2004.

early graduates. This will, however, be a cost to the state treasury. This will probably not have an affect until 2007–08, or two years into the traditional schedule, because current juniors and seniors may have accumulated enough credits under the block scheduling system to graduate early. **Exhibit 1–11** shows the number of early graduates for the last three years; all but six graduated one semester early. It is assumed that the six students who graduated one year early should be accelerated, so these students were taken out of the analysis. Summing the three years, subtracting the six students, and dividing the total by three gives an average number of early graduates of 232 $\{[(223 + 255 + 224 = 702) - 6] / 3 = 232\}$. Most spring semesters are between 90 and 95 days; the analysis uses 90 days. The total days of membership for 232 students is 20,880. The attendance rate for the district is approximately 95 percent, and the days in attendance are calculated by multiplying 95 percent by the total days of membership ($.95 \times 20,880 = 19,836$). This was converted to ADA and multiplied by 0.67, or two-thirds $[(19,836 / 180) \times .67 = 73.83]$. State funding for the district averaged \$30,910,720, and refined ADA (RADA) averaged 13,213. Therefore, each student earned \$2,339 $(\$30,910,720 / 13,213 = \$2,339)$. Finally, multiplying the RADA per student by two-thirds of the ADA equals \$172,688 $(73.83 \times \$2,339 = \$172,688)$, a conservative estimate of state aid gain. The net savings for 2005–06 and 2006–07 is estimated at \$1,103,680 per year and in subsequent years is \$1,276,368 $(\$172,688 + \$1,103,680)$.

CLASSROOM MANAGEMENT (REC. 3)

VISD does not consistently implement good classroom behavior management techniques, resulting in a high number of disciplinary incidents and disciplinary alternative education program placements. In July 2003, one director, two principals, five assistant principals, one special services counselor, and one teacher participated in a three-day classroom management program that used a trainer-of-trainers (TOT) model. TOT models are designed to teach trainers who in turn train others to implement the concepts and principles of the course. The district planned to send two elementary assistant principals in summer 2004 for the second level of this training, but had not yet developed a plan for ensuring that all teachers develop effective classroom management techniques.

Exhibit 1–12 shows that VISD had a much higher number and percentage of disciplinary incidents than its peers in 2002–03. The percentage, which was calculated by dividing the number of incidents by enrollment, does not reflect the overall percent of students engaging in incidents because in many cases

the same students engaged in several disciplinary incidents.

**EXHIBIT 1–12
NUMBER AND PERCENTAGE OF
DISCIPLINARY INCIDENTS VISD
AND PEER DISTRICTS**

2002–03

DISTRICT	NUMBER OF INCIDENTS	PERCENT
Tyler	7,030	41.3%
Lamar Consolidated	7,477	44.2%
Wichita Falls	7,152	47.8%
Bryan	7,407	53.2%
Victoria	9,549	66.1%

SOURCE: Texas Education Agency, PEIMS, 2002-03.

Exhibit 1–13 shows the number of disciplinary incidents from 2000–01 through 2002–03 by grade level and total figures.

**EXHIBIT 1–13
VISD NUMBER OF DISCIPLINARY
INCIDENTS BY LEVEL**

2000–01 THROUGH 2002–03

LEVEL	YEAR		
	2000–01	2001–02	2002–03
Elementary	1,048	807	792
Middle School	5,537	5,883	5,453
High School	4,221	4,326	3,304
Total	10,806	11,016	9,549

SOURCE: Texas Education Agency, PEIMS, 2000-01 through 2002-03.

Exhibit 1–14 shows the number of disciplinary incidents by type at VISD for 2000–01 through 2002–03. Violation of student code of conduct, excluding possession, purchase, or use of tobacco products and school-related gang violence, was the most common incident. More serious incidents in which VISD students engaged in 15 or more times included: drug, tobacco, or alcohol offenses; serious or persistent misconduct while placed at the DAEP; assault or aggravated assault; and school-related gang violence.

Exhibit 1–15 shows the 10 most common disciplinary incidents and the frequency of each incident in 2002–03 for VISD and its peer districts. VISD had more incidents than its peers in seven of the top ten categories, was second highest for two categories, and was lowest for one.

VISD also has a large number of DAEP placements and expulsions compared to most of its peers (**Exhibit 1–16**). This exhibit does not contain special education student placements. In 2002–03, VISD had the second highest number of disciplinary actions. The percentage was calculated by dividing the number of DAEP placements by the enrollment and, although it does not reflect the overall percentage of student placements because of

EXHIBIT 1-14
VISD – NUMBER OF DISCIPLINARY INCIDENTS BY TYPE
2000-01 THROUGH 2002-03

TYPE OF INCIDENT	2000-01	2001-02	2002-03
Disruptive Behavior	209	328	319
Conduct punishable as a felony	7	*	*
Possessed, sold or used marijuana or other controlled substance	212	124	240
Possessed, sold, used or was under the influence of an alcoholic beverage	22	19	35
Abuse of glue or aerosol paint	*	0	0
Public lewdness or indecent exposure	*	*	*
Retaliation against school employee	7	0	*
Conduct occurring off campus while student is not in attendance at school-related activity for felony offenses in Title 5	0	0	*
Conduct occurring off campus while student is not in attendance at school-related activity for felony offenses not in Title 5	*	0	*
Used, exhibited or possessed a firearm	0	*	0
Used, exhibited or possessed a illegal knife	*	*	*
Used, exhibited or possessed a club	6	0	*
Used, exhibited or possessed a prohibited weapon	*	*	*
Serious or persistent misconduct violating the student code of conduct while placed in alternative education program	36	106	155
Violation of student code of conduct not included in codes 33 and 34	10,075	10,260	8,549
Criminal mischief	0	0	*
Emergency Placement/Expulsion	*	0	*
Terrorist threat	15	9	9
Assault against a school district employee or volunteer	18	13	15
Assault against someone other than a school district employee or volunteer	82	38	56
Aggravated assault against someone other than a school district employee or volunteer	7	*	20
Sexual assault or aggravated assault against a school district employee or volunteer	0	0	*
Sexual assault or aggravated assault against someone other than a school district employee or volunteer	0	*	0
Possessed, purchased, used or accepted a cigarette or tobacco product (Code 33)	81	79	79
School-related gang violence (Code 34)	14	25	48
Total	10,806	11,016	9,549

SOURCE: Texas Education Agency, PEIMS, 2000-01 through 2002-03.
 NOTE: * Data is masked due to privacy requirements.

recidivism, it does provide a measurement by which one can make comparisons.

VISD is participating in two classroom management staff development programs. One is the Classroom Organization and Management Program (COMP), which is a TOT program designed to help teachers create effective learning environments and in which a few district employees have been trained. The other is the Texas Behavior Support Initiative (TBSI), which is designed to enhance positive behavior interventions for all students, especially students with disabilities. Positive discipline strategies focus on increasing desirable behaviors through encouragement instead of decreasing undesirable behaviors through punishment.

The Texas Education Code 21.451 states that districts may include conflict resolution and discipline strategies, including classroom management, as part of their staff development.

VISD should adopt a classroom management policy that requires all teachers to attend classroom behavior management training that emphasizes positive discipline strategies. It should also use

discipline referral data to schedule follow-up training if necessary. To accomplish this the district needs to monitor the number of disciplinary referrals by classroom. For example, the assistant director of MGC monitors the number of referrals for each teacher on a monthly basis. She uses this information to determine which teachers need additional help with developing effective intervention strategies.

GIFTED AND TALENTED (REC. 4)

VISD lacks a process for adequately identifying gifted and talented (G/I) students and, in particular, under-identifies elementary and minority students. This is a problem because the state mandates that school districts identify and meet the instructional needs of academically advanced students. **Exhibit 1-17** compares VISD's number and percentage of students identified as gifted and talented in 2003-04 with its peers, Region 3, and the state.

Exhibit 1-18 presents the number and percentage of VISD students identified as gifted and talented at each grade level in 2003-04. It shows the low number of students identified in the elementary school.

**EXHIBIT 1-15
VISD AND PEER DISTRICTS
NUMBER OF DISCIPLINARY INCIDENTS BY CATEGORY
2002-03**

TYPE OF INCIDENT	VISD	BISD	LCISD	WFISD	TISD
Disruptive Behavior	319	1,892	0	0	13
Possessed, sold or used marijuana or other controlled substance	240	54	81	67	36
Possessed, sold, used or was under the influence of an alcoholic beverage	35	5	12	19	20
Serious or persistent misconduct violating the student code of conduct while placed in alternative education program	155	3	7	253	0
Violation of student code of conduct not included in codes 33 and 34	8,549	5,264	6,896	6,569	6,357
Assault against a school district employee or volunteer	15	3	12	3	4
Assault against someone other than a school district employee or volunteer	56	16	34	15	7
Aggravated assault against someone other than a school district employee or volunteer	20	0	0	0	6
Possessed, purchased, used or accepted a cigarette or tobacco product (Code 33)	79	17	36	44	54
School-related gang violence (Code 34)	48	116	374	141	498
Total	9,516	7,370	7,452	7,111	6,995

SOURCE: Texas Education Agency, PEIMS, 2002-03.

**EXHIBIT 1-16
NUMBER AND PERCENT OF DAEP
PLACEMENTS OR EXPULSIONS
VISD AND PEER DISTRICTS
2002-03**

DISTRICT	NUMBER	PERCENT
Tyler ISD	400	2.3%
Lamar CISD	389	2.3%
Bryan ISD	516	3.6%
Victoria ISD	593	4.1%
Wichita Falls ISD	742	5.0%

SOURCES: Texas Education Agency, AEIS, PEIMS, 2002-03.

Exhibit 1-19 compares the percentage of VISD students identified as gifted and talented by ethnicity in 2003-04 to the district's ethnic makeup. It shows ethnic disparity in the number of students identified as gifted and talented. Whites comprise 37 percent of the school population and 65 percent of the G/T program, while Hispanics make up 53 percent of the student population and only 25 percent of the G/T program. African Americans represent eight percent of the school population, and four percent were identified as gifted and talented.

The Texas State Plan for the Education of Gifted/Talented Students requires districts to provide all populations with adequate G/T assessment and instructional services. Exhibits 1-18 and 1-19 show that VISD is not adequately identifying gifted and talented elementary and ethnic minority students.

During the district's G/T referral process, VISD gives both parents and teachers the opportunity to nominate students to the G/T program. It sends

**EXHIBIT 1-17
NUMBER AND PERCENT OF
STUDENTS IDENTIFIED AS GIFTED
AND TALENTED - VISD, PEER
DISTRICTS, REGION 3, AND STATE
2003-2004**

DISTRICT	NUMBER OF STUDENTS IDENTIFIED AS G/T	PERCENT OF STUDENTS IDENTIFIED AS G/T
Bryan ISD	1,497	10.6%
Lamar CISD	1,427	8.1%
Wichita Falls ISD	1,149	7.6%
Tyler ISD	1,252	7.2%
Victoria ISD	720	5.0%
Region 3	4,076	7.5%
State	335,805	7.8%

SOURCE: Texas Education Agency, PEIMS, 2003-04.

fliers home with all students to notify parents that they can nominate their children to the G/T program. Teachers receive a Teacher/Parent Referral Sheet that is used to refer students and document parent referrals. Diagnosticians, campus administrators, and designated teachers administer the diagnostic tests. In the process of the assessment, the district uses an instrument to measure creativity, an IQ test, mathematics and English grades, and qualitative information, including data gathered through observations, student portfolios, and teacher and parent surveys. Students who are English Language Learners (ELL) are assessed using a nonverbal intelligence test or a Spanish IQ test, if appropriate. Once all the assessment data on every referred student is gathered, a committee reviews and

**EXHIBIT 1-18
NUMBER AND PERCENTAGE OF
STUDENTS IDENTIFIED AS GIFTED
AND TALENTED BY GRADE LEVEL
2003-04**

GRADE LEVEL	NUMBER	PERCENT
K	0	0%
1	6	1%
2	16	2%
3	18	3%
4	19	3%
5	25	3%
6	51	7%
7	97	13%
8	110	15%
9	99	14%
10	97	13%
11	87	12%
12	95	13%
Total	720	100%

SOURCES: Texas Education Agency, PEIMS Student Data, 2003-04; VISD PEIMS coordinator, April 2004.

weighs the results to make the final decisions which are based minimum scores established by the district.

While this approach meets the acceptable guidelines of the Texas State Plan, the review team identified the following problems with the process:

- The district uses a two-year average in English or mathematics, thus penalizing students who excel in science but not in English or mathematics.
- Teachers provide input through both grades and surveys, therefore their input carries double weight.
- The standard error of measurement for the standardized tests is not considered.
- For each referred student, the district collects scores in as many as six areas including: two-year grade averages (grades 3-11); teacher referrals; parent referrals; IQ tests; measures of creativity; and portfolios. Students who meet the minimum scores on any three of the six may automatically qualify for the G/T program. The three criteria in which a student meets the minimum score requirement should include two quantitative and one qualitative measure. This process leaves much room for subjectivity.
- The district uses a complicated matrix for aggregating scores and making final selections. The matrix uses cut off scores for each of the six possible assessment areas and then applies weights to these pre-set scores. For example, a student scoring between 112 and 119 on the Cognitive Abilities Test receives a weight of three and a student scoring a 128 or higher receives a weight of five. The district sums the

**EXHIBIT 1-19
STUDENTS IDENTIFIED AS GIFTED AND
TALENTED BY ETHNICITY AND PERCENT OF
STUDENTS IN VISD BY ETHNICITY
2003-04**

ETHNICITY	NUMBER IDENTIFIED AS G/T	PERCENT IDENTIFIED AS G/T	PERCENT OF VISD STUDENTS BY ETHNICITY
White	468	65%	37%
Hispanic	180	25%	53%
Asian Pacific	42	6%	1%
African American	*	*	*
Native American	*	*	*

SOURCES: Texas Education Agency, PEIMS Student Data, 2003-04; VISD PEIMS coordinator, April 2004.

NOTE: * These data were masked due to privacy laws.

weights on each assessment to determine a students final scores and then ranks the students by score and grade level. To be eligible for the gifted program, a student should earn a minimum weighted score of 16 for grades 1 and 2, and 24 for grades 3 through 11, but the committee has some discretion in making the final selections.

In 2002, Carrollton-Farmers Branch ISD (CFBISD) received a rating of 'Recognized' by the Texas Education Agency for its gifted program; identification procedures for gifted students are included in the rating. CFBISD uses a case study approach to identify students as gifted. The student's assessment results are not aggregated into a single cut-off score; rather all scores are reported so committee members can see the peaks and valleys in student performance. In addition, CFBISD uses broad bands of performance instead of single test scores, taking into account the error in measurement. CFBISD does not weigh one type of score more heavily than another, and all assessment results are treated as equally important. In addition, the district uses its qualitative measures to provide rich descriptions of students. These descriptions come from teachers, parents, peers, and the student themselves.

VISD should revise the G/T identification process to make it more sensitive to identifying elementary and ethnic minority students. Specifically, the district should revise its identification process by: dropping grades as a criterion; considering the standard error of measurement when determining a student's score on a standardized test; making no distinction among the six assessments on which a student meets the minimum score; and discontinuing the use of the matrix to aggregate assessment results.

Once these changes are implemented, the district should gather student data on the number of students identified as gifted and talented in the elementary grades and for minority students to

determine if the numbers of these students identified as gifted and talented are increasing. If they are not, the district should make more revisions.

CAREER AND TECHNOLOGY (REC. 5)

While VISD offers numerous career and technology (CATE) courses, it does not systematically review the CATE program to ensure it meets student and job market needs. Texas requires public schools to offer programs that will help students transition into the job market or post-secondary education. Districts must offer courses from at least three of the eight career and technology areas (agricultural science and technology education, business education, career orientation, health science technology education, family and consumer sciences education/home economics education, technology education/industrial technology education, marketing education, and trade and industrial education).

The district’s program lacks direction and several courses are underenrolled. The district offers CATE courses at the Career Development Center (CDS) and at the two high school campuses. Even though

the number of students enrolled in CATE courses has almost doubled from 2001-02 to 2003-04, many students are not following a coherent set of courses. **Exhibit 1–20** shows the total number of students enrolled in each course from 2001–02 through 2003–04.

The VISD Career Development School (CDS) director, a position akin to a principalship, is responsible for the entire CATE program. This position reports to the assistant superintendent for School Improvement and is responsible for supervising all CATE teachers on all high school campuses. The position’s job title does not accurately reflect its responsibilities.

VISD also does not coordinate its middle school career programming through CATE. Typical middle school offerings are in the areas of woodworking and technology. Several years ago, all middle school students participated in career testing. However, no career testing has been completed for middle school students for at least two years. As a result, many middle school students have limited or no opportunity for authentic career exploration and planning.

**EXHIBIT 1–20
NUMBER OF VISD STUDENTS ENROLLED IN CATE COURSES
2001–02 THROUGH 2003–04**

PROGRAM/COURSE	2001–02	2002–03	2003–04
Business Education			
Accounting I	31	38	36
Business Communications	73	33	50
Business Computer Information Systems I	197	219	723
Business Computer Information Systems II	10	14	15
Business Law	NA	NA	36
Desktop Publishing	10	9	3
International Business	26	14	26
Introduction to Business	87	92	49
Note taking and Study Skills	33	33	90
Principals of Marketing	0	0	*
Record Keeping	28	34	62
Retailing	6	7	10
Criminal Justice			
Criminal Justice I	NA	NA	44
Criminal Justice II	NA	NA	41
Criminal Justice III	NA	NA	9
Criminal Justice IV	NA	NA	8
Family and Consumer Sciences			
Apparel	11	18	59
Child Care, Guidance, Management and Services	18	0	30
Child Development	70	71	124
Food Science and Technology	46	47	42
Food Technology	21	31	61
Individual and Family Life	52	43	159
Interior Design	50	75	98
Nutrition and Food Science	80	68	57
Personal and Family Development	98	111	183
Preparation for Parenting	34	27	89
Textile and Apparel Design	14	0	17

**EXHIBIT 1-20 (CONTINUED)
NUMBER OF VISD STUDENTS ENROLLED IN CATE COURSES
2001-02 THROUGH 2003-04**

PROGRAM/COURSE	2001-02	2002-03	2003-04
Health Science Technology			
Health Science Technology II	NA	NA	27
Health Science Technology III	20	19	34
Technology Education			
Architectural Graphics	24	32	32
Computer Applications	142	155	55
Construction Systems	53	54	69
Engineering Graphics	10	20	12
Engineering Principles	*	8	16
Problems and Solutions in Technology	*	*	*
Research, Design, and Development	6	*	6
Technology Systems	54	62	39
Technology Systems- Modular Computer Laboratory-Based	72	75	117
TELCOM 1 (CISCO)	NA	NA	23
TELCOM 2 (CISCO)	NA	NA	16
TELCOM 3 (CISCO)	NA	NA	8
TELCOM 4 (CISCO)	NA	NA	8
Video Technology	215	216	235
Technical Education			
Automotive Collision Repair I	35	33	44
Automotive Collision Repair II	9	10	17
Automotive Technician I	37	41	30
Automotive Technician II	11	14	7
Building Trades I	9	9	16
Building Trades II	6	0	7
Computer Design, Maintenance and Repair I	0	24	32
Computer Design, Maintenance and Repair II	0	11	6
Cosmetology I	24	22	21
Cosmetology II	14	16	14
Electrical Trades I	11	6	12
Electrical Trades II	*	*	*
Electronics I	14	11	13
Electronics II	*	*	*
Food production, Management and Services I	25	22	25
Food production, Management and Services II	12	7	7
Telecommunications and Networking I	25	*	*
Telecommunications and Networking II	*	*	*
Welding I	28	33	42
Welding II	9	17	7
Vocational Agri-science			
Advanced Animal Science	0	0	7
Advanced Floral Design	0	0	*
Agricultural Metal Fabrication	42	41	22
Agricultural Power Technology	0	0	40
Agricultural Science and Technology Career	12	0	19
Agricultural Structures	*	*	10
Animal Science	36	25	19
Applied Agri-science	25	23	10
Equine Science	0	0	7
Floral Design and Interior Landscape Development	61	58	27
Home Maintenance and Improvement	33	20	70
Introduction to Agricultural Mechanics	12	16	18
Introduction to Agri-science	67	46	50
Introduction to Horticulture	27	*	*
Landscaping	57	68	34
Personal Skill Development	*	*	17
Plant and Animal Production	21	19	50
Range Management	NA	NA	*
Wildlife and Recreation	42	41	0
Wildlife and Recreation Management	0	*	83

EXHIBIT 1-20 (CONTINUED)
NUMBER OF VISD STUDENTS ENROLLED IN CATE COURSES
2001-02 THROUGH 2003-04

PROGRAM/COURSE	2001-02	2002-03	2003-04
Work Based Cooperative Program			
Administrative Procedures I	30	0	65
Administrative Procedures II	*	0	*
Health Career Preparation I	NA	NA	77
Health Career Preparation II	NA	NA	7
Home Economics Career Preparation I	24	0	29
Home Economics Career Preparation II	6	0	0
Marketing Education Career Preparation I	15	0	27
Marketing Education Career Preparation II	*	0	26
Trade and Industrial Career Preparation I	NA	NA	153
Trade and Industrial Career Preparation II	NA	NA	21
Total	2,389	2,277	4,029

SOURCE: Texas Education Agency, PEIMS 2001-02 through 2003-04; VISD PEIMS coordinator, April 2004.

NOTE: * These data were masked due to privacy laws.

NA: Course was not available in that year.

The district should review its CATE program and eliminate course sequences with consistently low enrollment and that are not in demand in the current job market. VISD can accomplish this by establishing a business/postsecondary advisory committee who would work with the CDS director and the assistant superintendent of School Improvement to build a CATE program that best meets student needs. The group should develop a five-year comprehensive plan that includes renaming the director of CDS to director of CATE and redefining the position's job responsibilities. The job responsibilities should include:

- plans and improves CATE curriculum and programs;
- supervises and evaluates CATE teachers' performance;
- coordinates with business and industry, as well as postsecondary representatives for program improvement;
- approves expenditures, travel, and staff development for CATE personnel;
- supervises the operation, administration, and personnel at the CDS;
- evaluates the CATE program with the assistance of the director of Testing and Evaluation;
- compiles and files state and federal reports relating to CATE;
- articulates the district's strategic plan and goals in the area of career and technology education;
- participates on local committees for economic development and employee training needs;
- writes, submits, monitors, and evaluates federal and other grants related to CATE; and
- manages the CATE budget.

VISD should incorporate the middle school career courses and testing under the supervision of the director of CATE and develop a public relations campaign so that the community, students, administrators, and counselors know what is available through CATE.

**DISCIPLINARY ALTERNATIVE
EDUCATION PROGRAM (DAEP)
(REC. 6)**

VISD does not ensure that students placed at the disciplinary alternative education center stay current with their regular classroom assignments. Students should receive assignments for courses from teachers at their home campuses, but in general the process is not working. The assistant director of the MGC said there is poor communication between the DAEP and the home campuses, and that the procedures used are cumbersome. Teachers are supposed to send assignments to the assistant director who is responsible for ensuring the assignments get to the students. The process requires that a security guard escort each student to the assistant director's office and it can take several hours for a guard to be available.

In order to stay caught up with their schoolwork, students must receive assignments from their home campuses. This is especially critical for advanced and elective courses because the MGC teachers teach only the basic courses. **Exhibit 1-21** shows the certification levels, certification areas, and assignment of each MGC teacher. As this exhibit shows, all but one teacher is certified; this teacher is enrolled in an alternative certification program. Most of the teachers have certification in the area or a similar area in which they teach.

MGC has access to video teleconferencing. Some students might participate in AP courses, electives, or

**EXHIBIT 1-21
MITCHELL GUIDANCE CENTER TEACHERS BY CERTIFICATION AND ASSIGNMENT
2003-04**

TEACHER	CERTIFICATION LEVELS	CERTIFICATION AREAS	ASSIGNMENT
1	All level	Generic special education	Special Education Resource HS
2	Professional, elementary	Admin/mid management; early childhood ed handicap; general; mentally retarded	Special Education Resource MS
3	High school	Science composite	Science HS
4	All level	Generic special education	History HS
5	Professional, elementary	Admin/mid management; counselor; English as 2 nd language; general; psychology	English/Reading MS
6	High school	Computer information systems; mathematics	Math HS
7	Elementary	self contained History 1-8; ESL 1-6	Social Studies MS
8	All level	Generalist certification	Science MS
9	High school	English	English HS
10	1 st sem: Secondary 2 nd sem: Not certified	Out of State math Not certified	Math MS (Permanent Sub)

SOURCE: VISD Personnel Office, April 2004.

other advanced courses on their home campuses via distance learning. All students in VISD have email accounts.

VISD should ensure that MGC students stay caught up with all of their classes to facilitate their transition back to their home schools. The home campus teachers should be required to email (with a copy sent to the student’s teacher and the assistant director at MGC) class assignments to students placed at MGC.

ADVANCED PLACEMENT (REC. 7)

The district does not have a defined strategy for recruiting students to take advanced placement (AP) classes and exams. As a result, few Victoria ISD students take AP exams, thus missing the chance to receive college credit. Colleges generally award course credit for scores of 3 or above on AP tests. District administrators said teachers informally encourage students to take AP courses and discuss the value of these courses during parent night.

Exhibit 1-22 compares the percentage of VISD students who took AP courses in 2000-01 and 2001-02 to its peer districts and the state. For both years, VISD had lower participation rates in AP classes

than the state and all but one peer district. Participation rates for African American, Hispanic, and economically disadvantaged students were lower than for students as a whole.

Exhibit 1-23 compares the percentage of VISD students who took AP exams to the peer districts and the state in 2001 and 2002. The district had the lowest percentage of students taking AP exams. In 2002, only 6 percent of the students overall, 0.8 percent African American, 2 percent Hispanic, and 8.6 percent White, took AP exams, as compared to state averages of 15 percent overall, 6.7 percent African American, 11.4 percent Hispanic, and 18 percent White.

Exhibit 1-24 shows a breakdown of the number of AP exams taken and passed in VISD by ethnicity for 2001-02 through 2003-04. The number of AP exams that students took increased from 2001-02 to 2003-2004.

Exhibit 1-25 shows the number and percent of AP exams ordered by course in 2003-04.

Exhibit 1-26 shows the AP courses by content area offered at Memorial High School during the 2003-04. In comparing Exhibit 1-25 and 1-26,

**EXHIBIT 1-22
PERCENT OF STUDENTS TAKING ADVANCED COURSES
VISD, PEER DISTRICTS, AND THE STATE
2000-01 AND 2001-02**

DISTRICT	ALL STUDENTS		AFRICAN AMERICAN		HISPANIC		WHITE		ECONOMICALLY DISADVANTAGED	
	2002	2001	2002	2001	2002	2001	2002	2001	2002	2001
Wichita Falls	28.3%	27.9%	15.6%	16.2%	19.5%	17.9%	32.3%	32.0%	15.6%	14.4%
Lamar Consolidated	18.8%	14.8%	8.4%	8.4%	9.5%	7.6%	31.5%	24.2%	6.1%	5.6%
Bryan	15.7%	15.2%	7.3%	5.7%	9.9%	9.4%	23.9%	23.6%	6.5%	6.5%
Victoria	13.1%	14.2%	6.3%	9.0%	6.1%	8.9%	20.9%	19.8%	3.6%	5.8%
Tyler	12.8%	13.4%	7.9%	8.8%	10.3%	4.9%	18.4%	21.3%	7.3%	4.6%
State	19.4%	19.3%	12.5%	13.6%	14.9%	14.5%	23.8%	23.4%	13.1%	12.8%

SOURCE: Texas Education Agency, AEIS, 2002-03.

EXHIBIT 1-23
PERCENTAGE OF STUDENTS TAKING ADVANCED PLACEMENT EXAMS
VICTORIA ISD, PEER DISTRICTS, AND THE STATE
2001 AND 2002

DISTRICT	ALL STUDENTS		AFRICAN AMERICAN		HISPANIC		WHITE	
	2002	2001	2002	2001	2002	2001	2002	2001
Wichita Falls	25.8%	24.8%	11.1%	8.9%	15.2%	15.8%	28.8%	28.6%
Bryan	17.6%	17.6%	5.6%	8.9%	8.9%	9.5%	25.0%	24.0%
Tyler	13.6%	10.6%	10.0%	6.3%	7.1%	4.1%	18.3%	14.8%
Lamar Consolidated	9.4%	10.6%	4.4%	2.2%	3.7%	6.3%	14.9%	16.3%
Victoria	6.0%	5.7%	0.8%	3.0%	2.0%	1.6%	8.6%	8.5%
State	15.0%	14.3%	6.7%	6.2%	11.4%	11.1%	18.0%	16.9%

SOURCE: Texas Education Agency, AEIS, 2002-03.

EXHIBIT 1-24
NUMBER OF AP EXAMS TAKEN AND PASSED BY ETHNICITY
VISD 2001-02 THROUGH 2003-04

ETHNICITY	NUMBER OF AP EXAMS TAKEN			NUMBER OF AP EXAMS PASSED		
	2004	2003	2002	2004	2003	2002
White	163	154	142	NA	91	85
Hispanic	68	50	27	NA	22	16
Asian	12	23	21	NA	18	16
African-American	*	10	*	NA	*	*
Other	*	6	*	NA	*	*
Total	255	243	197	NA	141	121

SOURCE: VISD high school principal, April 2004.

NOTE: NA = Not Available

NOTE: * These data were masked due to privacy laws.

EXHIBIT 1-25
NUMBER AND PERCENT OF ADVANCED PLACEMENT EXAMS ORDERED BY COURSE
2003-04

COURSE NAME	NUMBER	PERCENT
Biology	3	1.2%
Calculus AB	2	0.8%
Calculus BC	27	10.6%
Computer Science I	16	6.3%
English Language & Composition III	73	28.6%
English Literature & Composition IV	32	12.5%
Government & Policy: US	15	5.9%
Macroeconomics	1	0.4%
Microeconomics	5	2.0%
Music Theory	1	0.4%
Physics C: Mechanical	1	0.4%
Psychology	8	3.1%
Spanish	4	1.6%
United States History	67	26.3%
Total	255	100%

SOURCE: VISD head counselor, Memorial High School, April 2004.

shows students are not taking AP exams in all AP courses. The largest discrepancy between AP courses offered and AP exam taken is in the foreign languages and the sciences.

Public schools in Florida increased student participation in AP courses and increased scores on AP examinations for minority students by offering bonuses to AP teachers whose students received scores of 3 or higher on AP exams. Since the program's inception in 1999, there has been a 76 percent increase in the number of AP exams taken by minority students and a 58 percent increase in the

number of AP exams taken by minority students that have received scores of 3 or higher.

In 2001, the state implemented the Texas Advanced Placement Incentive Program to recognize and reward students, teachers, and schools that demonstrate success in achieving the educational goals of the state. One incentive of the program provides participating schools \$100 for each student who receives a score of 3 or higher on an AP exam. The program allows for schools to use up to \$50 of each award for teacher bonuses. VISD participates in the AP Incentive Program and in 2003-04 received \$7,323. VISD is using its award money for supplies

**EXHIBIT 1-26
ADVANCED PLACEMENT COURSES
OFFERED
IN VISD 2003-04**

CONTENT AREA	COURSE NAME
Computer Science	Computer Science I
	Computer Science II
English	English Language & Composition III
	English Literature & Composition IV
	Art IV
Fine Arts	Music Theory
	French IV
Foreign Language	German IV
	Latin IV
	Spanish IV
	Calculus AB
Mathematics	Calculus BC
	Biology
Science	Chemistry
	Physics
	European History
Social Science	US Government and Politics
	Human Geography
	Macroeconomics
	Microeconomics
	Psychology
	United States History

SOURCE: VISD head counselor Memorial High School: Senior campus, April 2004.

and staff development. The AP Incentive Program also provides reimbursement for teachers to receive AP training, so the district could use some of this money for teacher bonuses.

The district should promote its AP program by awarding AP teachers with monetary incentives, such as \$50 bonuses, for each of their students who passes an AP exam with a three or higher. VISD already

receives funding for such bonuses. This recommendation would require a reallocation of these funds. VISD should also tap resources to help individual students succeed in college preparatory classes. One such program is Advancement Via Individual Determination (AVID). It targets economically disadvantaged and minority students in grades 5 through 12 who are academically in the middle and places them in advanced classes with support. More detailed information about this program can be obtained from www.avidonline.org.

LIBRARIANS (REC. 8)

Some VISD libraries are not adequately staffed to facilitate student learning. In 2003-04, the district had 16.8 librarians and 12 library aides. The district is understaffed by 5.2 librarians and 6.5 library aides compared to the minimal standards set by the Texas State Library and Archives Commission (TSLAC).

The TSLAC provides criteria for identifying library programs as *exemplary, recognized, acceptable, or below standard* in five areas: library learning environment, curriculum integration, resources, library program management, and facilities. It bases staffing standards on the school's average daily attendance (ADA). **Exhibit 1-27** provides the TSLAC rating criteria for professional and paraprofessional staffing.

Exhibit 1-28 shows VISD student enrollment by school and compares library levels to TSLAC "acceptable" standards. VISD falls short of the "acceptable" standards by two librarians and a part-time library aide at the high school level, and by 3.5 librarians and 8.5 library aides at the elementary level.

While the MHS Senior campus meets the acceptable standards as defined by TSLAC, both the Senior and

**EXHIBIT 1-27
TSLAC SCHOOL LIBRARY STANDARDS
PROFESSIONAL AND PARAPROFESSIONAL STAFFING
2004**

AREA	STANDARD		
	EXEMPLARY	RECOGNIZED	ACCEPTABLE
Staffing, Professional	At least:	At least:	At least:
0-500 ADA	1.5 Certified Librarians	1.0 Certified Librarian	1.0 Certified Librarian
501-1,000 ADA	2.0 Certified Librarians	1.5 Certified Librarians	1.0 Certified Librarian
1,001-2,000 ADA	3.0 Certified Librarians	2.0 Certified Librarians	1.0 Certified Librarian
2,001+ ADA	3.0 Certified Librarians + 1.0 Certified Librarian for each 700 students	2.0 Certified Librarians + 1.0 Certified Librarian for each 1,000 students	2.0 Certified Librarians
Staffing, Paraprofessional	At least:	At least:	At least:
0-500 ADA	1.5 paraprofessionals	1.0 paraprofessionals	0.5 paraprofessionals
501-1,000 ADA	2.0 paraprofessionals	1.5 paraprofessionals	1.0 paraprofessionals
1,001-2,000 ADA	3.0 paraprofessionals	2.0 paraprofessionals	1.5 paraprofessionals
2,001+ ADA	3.0 paraprofessionals + 1.0 paraprofessionals for each 700 students	2.0 paraprofessionals + 1.0 paraprofessionals for each 1,000 students	2.0 paraprofessionals

SOURCE: Texas State Library and Archives Commission (TSLAC), School Library Programs: Standards and Guidelines for Texas, 2004.

EXHIBIT 1-28
VISD ENROLLMENT, NUMBER OF LIBRARIANS AND LIBRARY AIDES,
TSLAC STANDARDS BY CAMPUS
2003-04

CAMPUS	ENROLLMENT	ADA*	LIBRARIANS	TSLAC STANDARDS	OVER/ (UNDER)	LIBRARY AIDES	TSLAC STANDARDS	OVER/ (UNDER)
MHS: Senior	1,614	1,533	1.3	1.0	0.3	2.0	1.5	0.5
MHS: Stroman	2,267	2,154	1.0	2.0	(1.0)	3.0	2.0	1.0
Profit Academic Center	167	159	0.0	1.0	(1.0)	0.0	0.5	(0.5)
Crain MS	1,011	960	1.0	1.0	0	1.0	1.0	0
Howell MS	1,066	1013	1.0	1.0	0	1.0	1.5	(0.5)
Patti Welder MS	1,056	1003	1.0	1.0	0	1.0	1.5	(0.5)
Aloe ES	553	525	1.0	1.0	0	0.0	1.0	(1.0)
Chandler ES	591	561	0.5	1.0	(0.5)	0.0	1.0	(1.0)
Dudley ES	521	495	1.0	1.0	0	0.0	0.5	(0.5)
FW Gross ES	499	474	0.0	1.0	(1.0)	1.0	0.5	0.5
Guadalupe ES	123	117	0.0	1.0	(1.0)	1.0	0.5	0.5
Hopkins ES	458	435	1.0	1.0	0	0.0	0.5	(0.5)
Juan Linn ES	457	434	1.0	1.0	0	0.0	0.5	(0.5)
DeLeon ES	606	576	1.0	1.0	0	0.0	1.0	(1.0)
Mission Valley ES	209	199	1.0	1.0	0	1.0	0.5	0.5
O'Conner ES	583	554	1.0	1.0	0	0.0	1.0	(1.0)
Rowland ES	497	472	1.0	1.0	0	0.0	0.5	(0.5)
Shields ES	646	614	1.0	1.0	0	0.0	1.0	(1.0)
Smith ES	519	493	1.0	1.0	0	0.0	0.5	(0.5)
Vickers ES	564	536	1.0	1.0	0	0.0	1.0	(1.0)
William Wood ES	120	114	0.0	1.0	(1.0)	1.0	0.5	0.5
Total	14,127	13,421	16.8	22.0	(5.2)	12.0	18.5	(6.5)

SOURCES: VISD employee salary report, Business and Finance Department, April 2004; Texas State Library and Archives Commission, School Library Programs: Standards and Guidelines for Texas, 2004.

* ADA was calculated by multiplying school membership by 95 percent.

Stroman campus librarians said that it was difficult to offer high quality library services with the small number of staff. The libraries are open from 7:30 AM to 4:00 PM. The library at the Senior campus serves as a homework center and remains open until 5:30 PM Monday through Thursday, but the librarian is not there to assist and students may not check out books during this time.

VISD should hire 5.2 additional librarians and 6.5 library aides to better meet student needs. The fiscal impact of this recommendation beginning in 2005-06 is based on an average librarian salary of \$42,000 and an average library aide salary of \$11,000. The annual cost of hiring 5.2 librarians is \$238,555 ($[\$42,000 \times 1.028 \text{ variable benefits} + 2,700 \text{ fixed benefits}] \times 5.2$). The cost of hiring 6.5 library aides is \$91,052 ($[\$11,000 \times 1.028 \text{ variable benefits} + 2,700 \text{ fixed benefits}] \times 6.5$). The total cost of implementing this recommendation is \$329,607 annually (\$91,052 + \$238,555) beginning in 2005-06.

LIBRARY COLLECTION (REC. 9)

VISD is not equitably distributing its book and periodical collection across schools. Some of the district's library book collections do not meet state recommended standards in number of books, periodicals, and newspapers per student while others are well above the standard. In 2002-03, the district

conducted a study of its current library holdings.

Exhibit 1-29 compares the district's library holding to the state-adopted minimum acceptable standards. As this exhibit shows, the number of library holdings is below acceptable standards in seven schools, and the number of periodical and newspaper holdings is below standards in ten schools. Fourteen schools are above the standards in library holdings and seven schools are above the standards in periodicals.

In May 2003, district administrators proposed that the board allocate Capital Acquisition Plan money to increase the holdings of several libraries to bring them up to state standards; however, no board action was taken on this proposal.

VISD should redistribute library holdings and purchase additional books to bring all its libraries up to minimum standards. It should redistribute the books and periodicals at the elementary level to ensure that every elementary school has an adequate collection. The district should also allocate \$280,959 in 2004-05 and 2005-06 to purchase new books, periodicals, and magazines for the secondary schools. MHS-Stroman needs 11,121 books and two periodicals or magazines; MHS-Senior needs 1,511 books; the Profit Academic Center needs 9,000 books and 45 periodicals or magazines; and Howell Middle School needs eight periodicals. According to

**EXHIBIT 1-29
LIBRARY HOLDINGS, SCHOOL LIBRARY PROGRAM MINIMUM
ACCEPTABLE STANDARDS, NUMBER OVER AND UNDER STANDARDS
2002-03**

CAMPUS	TOTAL LIBRARY HOLDINGS	MINIMUM ACCEPTABLE STANDARDS	TOTAL PERIODICALS & NEWSPAPERS	MINIMUM ACCEPTABLE STANDARDS	OVER/(UNDER) LIBRARY HOLDINGS/ PERIODICALS
MHS: Senior	26,839		62	45-75	(1511)/0
MHS: Stroman	19,644	30,765	43	45-75	(11,121)/(2)
Profit Academic Center	0	9,000	0	45-75	(9,000)/(45)
Crain MS	19,074	16,770	56	40-70	2,304/0
Howell MS	19,375	16,455	32	40-70	2,920/(8)
Patti Welder MS	18,393	17,055	60	40-70	1,338/0
Aloe ES	10,440	9,000	20	20	1,440/0
Chandler ES	13,095	9,000	24	20	4,095/4
Dudley ES	12,894	9,000	11	20	3,894/(9)
FW Gross ES	7,397	9,000	11	20	(1,603)/(9)
Guadalupe ES	4,243	9,000	15	20	(4757)/(5)
Hopkins ES	12,844	9,000	30	20	3,844/10
Juan Linn ES	19,950	9,000	225	20	10,950/205
DeLeon ES	14,388	9,195	281	20	5,193/261
Mission Valley ES	8,077	9,000	7	20	(923)/(13)
O'Conner ES	11,803	9,000	271	20	2,803/251
Rowland ES	11,000	9,000	17	20	2,000/(3)
Shields ES	36,692	10,005	45	20	26,687/25
Smith ES	9,123	9,000	13	20	123/(7)
Vickers ES	10,925	9,000	26	20	1,925/6
William Wood ES	7,971	9,000	5	20	(1,029)/(15)
Total	294,167	254,595	1,254		39,572/646

SOURCES: VISD, assistant superintendent for Curriculum and Instruction, April 2004; Texas State Library and Archives Commission.

the district, the average cost per book is \$25.83 and the average cost of periodicals is \$57.50. The total cost for bringing the library collections up to minimum standards is estimated at \$561,918 [(\$25.83 x 21,632) + (55 x \$57.50)]. The district should redistribute current holdings and purchase at least half the necessary books and periodicals during the 2004-05 school year and complete the process by 2005-06. In subsequent years, VISD should budget funds for replacement books based on the average cost of the book times enrollment. Based on enrollment in 2003-04 enrollment this would be approximately \$369,782 (\$25.83 x 14,316) beginning in 2006-07.

HEALTH SERVICES (REC. 10)

VISD's Health Services coordinator is a part-time position that does not have enough time to effectively and efficiently carry out the duties required of the position. The Health Services coordinator has the following job responsibilities:

- Program Organization: develops health service objectives and goals; recommends policies; collaborates with district level administrators; coordinates health service activities with those in the state and community; assists in recruiting health service applicants; serves as the district's media spokesperson on health-related issues;

maintains ongoing evaluation of health services programs, services, and staff; and prepares health services reports.

- Personnel Management: verifies licensure; assists in making staff assignments and developing program structure; conducts performance appraisals for school health staff; coordinates and conducts district meetings, workshops, and in-service training programs; and develops and implements orientation for new staff members and substitute nurses.
- Management of Fiscal Functions: ensures that fiscal resources address the district's mission and assists in preparing the annual health services budget.
- School and Community Relations: interprets programs, philosophies, and policies relating to health issues; maintains liaisons with social, professional, civic, volunteer, and other community agencies; and facilitates the district's school health advisory council.
- Professional Growth and Development: maintains membership in local, state, and national organizations; evaluates school nursing practices in relation to professional practice standards and relevant statutes, regulations, and

policies; and remains current on new medical developments in health-related fields.

- Other: performs other tasks as the assistant superintendent for School Administration may assign.

In addition to her position as the Health Services coordinator, the coordinator serves as a half-time nurse for the CDC and the Profit Academic Center. The number of students at these schools varies depends on the semester and the time of the year. The schools combine to serve an average of 500 students on a daily basis. As a result of her responsibilities as a nurse, the coordinator said she has little time for completing her coordinator responsibilities. Specifically, it is very difficult for her to visit the school nurses on their campuses and evaluate their performance.

Exhibit 1–30 compares VISD’s health services budgeted expenditures with its peer districts and the state. VISD’s health services budget is considerably below its peers and the state.

VISD should make the Health Services coordinator position full-time and hire a full-time Licensed Vocational Nurse (LVN) to provide services to the Career Guidance Center and Profit Academic Center. The coordinator would supervise the LVN’s at the CDC and Profit Academic Center and still have ample time to effectively coordinate the Health Services program.

The fiscal impact of this recommendation is based on the average salary of \$16,408 for district LVNs. The total annual cost is \$19,567 [(\$16,408 x 1.028 variable benefits] + \$2,700). The first year costs are based on a January 2005 implementation date, for a 2004-05 cost of \$13,045 (\$19,567 / 12 x 8).

NURSING STAFF (REC. 11)

VISD’s assignment of Registered Nurses (RNs) and Licensed Vocational Nurses (LVNs) does not meet the recommended standards of student-to-health

service provider ratio at the larger campuses, nor does it provide each campus with access to an RN. The National Association of School Nurses and Texas Association of School Nurses recommend a maximum ratio of 750 students per school nurse.

Exhibit 1–31 provides the caseloads and the assignments of RNs or LVNs for each campus in VISD.

All middle schools and high schools have more than 1000 students per nurse compared to the recommended nurse to student ratio of 1:750. In calculating this ratio, the review team included both RNs and LVNs. The National Association of School Nurses (NASN) takes the position that all school nurses be licensed as RNs. VISD employs 11.5 RNs and 11 LVNs.

To better serve VISD students, the district should hire five additional LVNs, one for each middle and high school campus. The district should also ensure that every elementary school student has access to an RN by teaming schools. For example, Rowland Elementary has a RN and Chandler Elementary has an LVN. The RN and LVN should provide health services to both campuses, with the RNs mentoring the LVNs. The teams should form a MWF/TTH or other fifty/fifty schedule and rotate between the two schools.

The annual cost of implementing this recommendation is estimated at \$97,837 based on an annual LVN salary of \$16,408 plus benefits [(\$16,408 x 1.028) + \$2,700 x 5 positions]. The first year costs are estimated at \$65,225 (\$97,837/12 x 8) based on a January 2005 implementation date.

COUNSELING SERVICES (REC. 12)

VISD counselors are not spending a sufficient amount of time working directly with students as required by state law. The district is aware of the problem and has developed an initiative to revise the guidance and counseling services, but this initiative has not been fully implemented.

**EXHIBIT 1–30
BUDGETED EXPENDITURES FOR HEALTH SERVICES–VISD, PEER DISTRICTS, AND STATE 2003–04**

DISTRICT	EXPENDITURES PER STUDENT	BUDGETED HEALTH SERVICES EXPENDITURES
Lamar Consolidated	\$77	\$1,373,160
Tyler	\$72	\$1,245,092
Bryan	\$71	\$999,731
Wichita Falls	\$63	\$948,592
Victoria	\$48	\$682,307
State	\$64	\$275,916,155

SOURCE: Texas Education Agency, PEIMS Financial Data, 2003–04.

**EXHIBIT 1-31
VISD RN AND LYN CASELOADS BY CAMPUS
2003-04**

CAMPUS	RN	LYN	ENROLLMENT	NUMBER OF STUDENTS PER RN OR LYN
Aloe Elementary	1		553	1:553
C.O. Chandler Elementary		1	591	1:591
Coletto Creek School		1	50	1:50
Crain Middle	1		1,011	1:1,011
Dudley Elementary Magnet	1		521	1:521
FW Gross Montessori Magnet		1	499	1:499
Guadalupe Elementary		0.5*	123	.5:123
Hopkins Elementary Magnet		1	458	1:458
Howell Middle	1		1,066	1:1,066
Juan Linn Elementary Magnet		1	457	1:457
Juvenile Center for Academic Achievement	0.25**		16	.25:16
Juvenile Detention Center	0.25**		21	.25:21
DeLeon Elementary	1		606	1:606
Memorial High School	1	2	3,881	3:3,881
Mission Valley Elementary		1	209	1:209
Mitchell Guidance Center	0.5**		102	.5:102
O'Connor Elementary Magnet	1		583	1:583
Patti Welder Middle Magnet	1		1,056	1:1,056
Profit Academic Center for Success	0.5		167	.5:167
Rowland Elementary	1		497	1:497
Shields Elementary Magnet		1	646	1:646
Smith Elementary		1	519	1:519
Vickers Elementary	1		564	1:564
William Wood Elementary		0.5*	120	.5:120
District Total	11.5	11	14,316	1:636

SOURCES: VISD Health Services coordinator, April 2004; Texas Education Agency, PEIMS Student Data, 2003-04.
NOTE. * ** This reflects the same RN or LYN.

As part of the initiative, the district contracted with the University of Houston-Victoria to conduct a survey of secondary guidance counselors' perceptions of their professional roles, support systems, and time spent utilizing the components of a comprehensive counseling program. Two professors interviewed nine middle school and eleven high school counselors. The study found that counselors perceptions of their positions are: (1) that they are required to complete too many non-counselor related administrative duties; (2) that central administration is not sufficiently involved in school counseling at the campus level; (3) that teachers, parents, and administrators do not understand the counselor's role; (4) and that counselors are losing their professional identity.

In June 2003, the high school counselors, the assistant superintendent for School Improvement, and the high school principal met to discuss how to remove testing and scheduling responsibilities from the counselors to allow them more time to work with individuals and groups of students. Several strategies were discussed and implementation of the strategies was to begin in fall 2003. Counselors, however, told the review team that they still had many administrative duties. In addition, the assistant superintendent for School Improvement told the review team that an attempt was made to relieve high

school counselors of testing and scheduling responsibilities but the attempt did not work out as planned.

The UHV study also found that the counselors were not teaching a guidance curriculum. The report stated that none of the high school counselors had a counseling calendar that would indicate regular appointments for personal counseling, classroom guidance, or group counseling. Further, no guidance curriculum was implemented at any of the middle schools. The assistant superintendent of School Improvement said that the findings of the report were accurate.

Senate Bill 518, passed during the 2001 Legislative Session, requires all school counselors to assume responsibilities for working with school faculty and staff, students, parents, and the community to plan, implement, and evaluate a developmental guidance and counseling program.

One method some school counselors use to ensure that they offer direct counseling services is to track the time spent in each of their daily activities. *Developing and Managing your School Guidance Program Third Edition* by N. Gysbers and P. Henderson (2002) provides a method to help counselors evaluate the use of their time.

To increase the time counselors spend in direct contact with students, VISD should adopt a policy on the appropriate use of counselor time and review all counselor duties to ensure they have the time to develop and implement a guidance and counseling program. VISD should use a time-recording system to track the activities the counselors engage in on a daily basis to help determine how to adjust their daily responsibilities.

DISTANCE LEARNING (REC. 13)

VISD invested in distance learning technology but is not effectively using its capacity. In 2000–01, the district spent \$393,373 to complete installation of distance learning technology at the four high school campuses and to install computers and internet connections at three elementary schools, but it does not have a plan to maximize use of distance learning at the high schools.

Only Latin classes and on-line technology courses are offered via distance learning. Latin classes have been offered at the high school level via distance learning for three years. Enrollment for the Latin classes in 2003–04 was 169 students, up from 92 students in 2002–03. At the Profit Academic Center, only four students used distance learning for an on-line computer applications course in 2003–04. The MGC's video teleconferencing unit is broken and has not been used in several years according to the assistant director of the MGC.

Distance learning is a cost-effective way of increasing course offerings. Many school districts partner with local community colleges to offer dual high school/college credit courses. Distance learning can also be used to teach small AP classes and for staff training and adult education programs.

VISD should increase its distance learning capacity to expand curricular offerings to the students.

STANDARDS FOR INSTRUCTIONAL TECHNOLOGY (REC. 14)

The district lacks standards to ensure that instructional technology software purchases are compatible with each other and adequately serve district needs. Because of the lack of standards, the district has purchased unneeded and duplicate software. The district's technology plan states, "There is no specific system in place to ensure that software purchased by the campus is aligned with the district and/or state curriculum standards such as the Texas Essential Knowledge and Skills. Also, there is no system in place for determining the effectiveness of the software that is in place or evaluation of future software purchases."

Individual schools make instructional software purchase decisions. The schools use approximately

400 different instructional software products, with some schools using only one instructional software product and others using more than 100. Schools are not ensuring that their software purchases support district-wide learning objectives.

Effective software purchases are compatible with existing technology and support district-level learning objectives.

The district should establish district-wide standards for purchasing software products and develop a list of approved software products based on the standards. The district's technology committee should develop the list of approved software products based on products that support VISD's instructional technology learning objectives. The district should establish a policy prohibiting the installation of any software product on teacher or student computers that is not on the approved list, without approval from the MIS Department.

CHEERLEADING SQUAD AND DRILL TEAM (REC. 15)

The makeup of the cheerleading squad and the dance/drill team does not reflect sound equity and inclusionary practice. For example, there are nearly twice as many Whites as Hispanics on the cheerleading squad and more than twice as many on the dance/drill team for 2003-04. **Exhibit 1–32** shows the ethnic breakdown by campus for fall 2003:

The VISD *Handbook of Athletic Policies* does not address equity in eligibility requirements or in expectations of coaches or athletic programs. The University Interscholastic League and TEA specifically state that they do not "monitor, recommend, nor prescribe the process of selecting cheerleaders or drill teams." Instead, these organizations expect that local school districts will address any specific concerns regarding such procedures. This lack of regulation, coupled with a high expectation for fund-raising, may have contributed to the ethnic imbalance on the drill/dance team over time.

Results of parent surveys indicate that many families cannot afford to have their children participate in either cheerleading or drill/dance team because of the cost of uniforms and travel, among other things. Parents also indicated that fundraising was such a high priority that some students were intimidated by the expectation that their families would be required to contribute substantially if they were to participate.

Continuation of these practices without intervention will perpetuate ethnic imbalance and may endanger continuation of the district's Title IX funding. According to the National Women's Law Center, studies show that high school girls who participate in

**EXHIBIT 1-32
PARTICIPATION ON CHEERLEADING SQUAD AND DANCE/DRILL TEAM
BY CAMPUS AND ETHNICITY
FALL, 2003**

TYPE OF TEAM	WHITE	HISPANIC	AFRICAN AMERICAN	ASIAN
Dance/Drill Team: Stroman (9 th -10 th grades)	40	28	*	*
Memorial High School	29	18	*	0
Dance/Drill Team Totals	69	46	6	1
Cheerleading: Stroman (9 th -10 th grades)	10	*	0	*
Memorial High School	6	*	0	0
Cheerleading Totals	16	7	0	0

SOURCE: VISD, cheerleading coordinator, April 2004.
NOTE: * = These data were masked due to privacy laws.

sports generally earn better grades, score higher on standardized tests, have lower rates of teen pregnancy, and are more likely to graduate than non-athletes.

VISD should develop specific policies and procedures that encourage equity in drill/dance team participation. It should adopt a policy and develop procedures to create a more ethnically diverse

drill/dance team and examine external funding opportunities that would make it possible for all interested students to fully participate in such activities.

For background information on Educational Service Delivery, see p. 171 in the General Information section of the appendices.

FISCAL IMPACT

RECOMMENDATION	2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
CHAPTER 1: EDUCATIONAL SERVICE DELIVERY							
1. Create a Curriculum coordinator position with expertise in secondary education, mathematics and science.	(\$38,821)	(\$58,232)	(\$58,232)	(\$58,232)	(\$58,232)	(\$271,749)	\$0
2. Change the accelerated block schedule to a traditional seven period schedule with a zero-hour option.	\$0	\$1,103,680	\$1,103,680	\$1,276,368	\$1,276,368	\$4,760,096	\$0
3. Require all teachers to participate in classroom behavior management training and use discipline referral data to schedule follow-up skill building training as needed.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Revise the identification process for the Gifted and Talented Program to make it more sensitive in identifying elementary and minority students.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Review all Career and Technology Education courses and eliminate those with consistently low enrollment and that are not in demand in the current job market.	\$0	\$0	\$0	\$0	\$0	\$0	\$0

FISCAL IMPACT (CONTINUED)

RECOMMENDATION	2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE- TIME (COSTS) OR SAVINGS
CHAPTER 1: EDUCATIONAL SERVICE DELIVERY							
6. Ensure that all students placed at the disciplinary alternative education center stay current with their regular classroom assignments.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Award advanced placement (AP) teachers a monetary incentive for every student they teach who takes an AP exam and scores a three or higher.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Hire 5.2 additional librarians and 6.5 library aides and implement staffing standards consistent with the Texas State Library and Archives Commission.	\$0	(\$329,607)	(\$329,607)	(\$329,607)	(\$329,607)	(\$1,318,428)	\$0
9. Redistribute library holdings and purchase additional books and periodicals to meet state-recommended standards.	(\$280,959)	(\$280,959)	(\$369,782)	(\$369,782)	(\$369,782)	(\$1,671,264)	\$0
10. Make the Health Services coordinator position full-time and hire a full-time Licensed Vocational Nurse (LVN) to provide services to the Career Guidance Center and Profit Academic Center.	(\$13,045)	(\$19,567)	(\$19,567)	(\$19,567)	(\$19,567)	(\$91,313)	\$0
11. Hire five additional Licensed Vocational Nurses, one for each of the three middle schools and two for the Memorial High School campuses to ensure all students have adequate access to a nurse.	(\$65,225)	(\$97,837)	(\$97,837)	(\$97,837)	(\$97,837)	(\$456,573)	\$0
12. Adopt a policy on the appropriate use of counselor time to increase the time counselors spend in curriculum guidance services and direct contact with students.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
13. Increase the use of distance learning capabilities to expand curricular offerings to the students.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
14. Develop district-wide standards for purchases of instructional software products.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
15. Develop specific policies and procedures that encourage equity in drill/dance team participation.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Totals—Chapter 1	(\$398,050)	\$317,478	\$228,655	\$401,343	\$401,343	\$950,769	\$0

CHAPTER 2

DISTRICT LEADERSHIP, ORGANIZATION, AND MANAGEMENT

The management of a school district requires cooperation between the elected members of the Board of Trustees, the superintendent, and the district staff. The board's role is to set the goals and objectives for the district in both instructional and operational areas, determine the policies that will govern the district, approve plans to implement those policies, and provide the funding necessary to carry out the plans.

VISD is governed by an elected seven-member board of trustees. Two trustees are elected from super districts while the remaining five are elected from single-member districts. Board members serve three-year staggered terms, with elections held annually. **Exhibit 2-1** shows each board member, the year they were initially elected to the board, and their term of office.

Elections held on May 15, 2004, returned two incumbent board members and brought one new member to the Board of Trustees. H. Ray Walden was re-elected for a second term, and Bernard Klimist was elected to his first full term, as he was appointed to the board in 2003 to fill a vacancy left by a board member who resigned. James Murphy, Sr. was elected to the District 1 position. Mr. Murphy is a former VISD trustee, having served a term from 1989 to 1992.

In addition, Board Member Dr. Estella De Los Santos was appointed to the board on June 17, 2004, to fill a vacancy created in May when Milton Stolis, an eight-year board member, resigned.

Mr. Ronald Peace has served as the superintendent for VISD since April 2000. Prior to being hired as superintendent, Mr. Peace served as VISD's assistant to the superintendent and assistant superintendent for Facilities and School Services.

ACCOMPLISHMENTS

- VISD ensures that legal expenditures are carefully monitored and controlled.
- VISD provides a timely one-page summary to keep employees informed of board actions.

FINDINGS

- VISD's organizational structure hinders accountability and efficiency.
- VISD's staffing standards for campus leadership positions are not consistent with those established by the Southern Association of Colleges and Schools (SACS). Compared to the standards, all the elementary schools are overstaffed, while the high school is understaffed.
- The district's strategic planning process is not well organized, focused, or based on data.
- VISD lacks a process to monitor board training. As a result, some VISD board members lack the required number of training hours and/or training in required topics.
- VISD does not ensure that its travel expenses are in compliance with its local board policy and state law. Travel records for board members show that in some cases the district initially paid for spousal travel expenses, which is in violation of state law. While expenses for spousal air travel were eventually reimbursed to the district, VISD advanced the travel expenses.
- VISD board meetings are not efficient.
- VISD board policies are not on the district's website, limiting access to the policies.

EXHIBIT 2-1

VISD'S BOARD OF TRUSTEES

BOARD MEMBER NAME	POSITION	DISTRICT	TERM	YEAR ELECTED
James Murphy, Sr.	Member	District 1	2004-07	2004
Robert T. Treviño	Member	District 2	2003-06	1997
Ludvik J. Svetlik	Vice-President	District 3	2002-05	2002
Laura Smith	Member	District 4	2003-06	2000
Estella De Los Santos	Member	District 5	2004-07	2004 [#]
Bernard T. Klimist	President	District 6	2004-07	2003 [*]
H. Ray Walden	Secretary	District 7	2004-07	2001

SOURCE: VISD, April 2004.

NOTES: ^{*}Appointed to fill a board vacancy in 2003.

[#]Appointed to fill a board vacancy in 2004.

RECOMMENDATIONS

- **Recommendation 16 (p. 28): Restructure the district's organization and replace the assistant superintendent positions with a deputy superintendent to strengthen accountability and efficiency.** The recommended organizational structure eliminates three assistant superintendent positions, two of which are vacant, and creates a new position, deputy superintendent. All Curriculum and Instruction functions are under the deputy superintendent. The proposed structure creates an Evaluation and School Improvement unit within the Curriculum and Instruction Department that is responsible for testing and evaluation, staff development, and planning.

This structure combines all Technology functions and places them under the direction of a single position that reports directly to the superintendent. Responsibility for purchasing functions is transferred from the Plant Maintenance Department to the chief financial officer and Risk Management is transferred to Personnel. This organization also consolidates all safety-related functions under a single position.

- **Recommendation 17 (p. 29): Amend campus leadership staffing standards to make more efficient use of personnel.** VISD should amend its staffing standards to be more consistent with those of Southern Association of Colleges and Schools, the regional accrediting association. The district should implement the staffing standards by January 2005 so that contract renewal adjustments can be made and the budgets for 2005-06 modified. The standards should be adjusted so that elementary school assistant principal positions are reduced by 12.5, middle school assistant principal positions are reduced by 1.5, and high school assistant principal positions are increased by three positions.
- **Recommendation 18 (p. 32): Create a function in VISD to coordinate and oversee the strategic planning process and ensure that it is linked to the evaluation and staff development functions.** The district should create a unit that includes long-range planning, campus-based planning, evaluation, and staff development. To accomplish this, the district should create an executive director of School Improvement position and move the current positions of director of Testing and Evaluation and the director of School Improvement under

it. The job description for the new executive director of School Improvement position should include the responsibilities of conducting training for all employees involved in the strategic planning process, oversight of the process throughout the year, and oversight of the monitoring and evaluation of the strategic plan implementation.

- **Recommendation 19 (p. 35): Establish training calendars for each board member to ensure that the district complies with state training requirements.** The secretary to the board should establish a calendar for each board member identifying the training requirements as required by the Texas Administrative Code (TAC), Title 19. On a regular basis, the superintendent should present a training status report to each board member in addition to identifying training opportunities for the board. Team Building training should be scheduled so that all elected board members can attend.
- **Recommendation 20 (p. 36): Develop a local district policy on advances for travel expenses.** To ensure that VISD complies with state law, the policy should state that only business-related expenses are eligible for travel advances. The superintendent should draft a policy and administrative procedure for employee and board travel expenditures and obtain board approval by November 2004.
- **Recommendation 21 (p. 37): Develop strategies to make VISD board meetings more efficient and effective.** The board president and the superintendent should discuss options to make more efficient use of regular board meetings. The board president should present a proposal for changes to the entire board by December 2004, to take effect in January 2005.
- **Recommendation 22 (p. 38): Contract with the Texas Association of School Boards to automate VISD's board policy manual and complete the placement of administrative bulletins on the web site.** The district should have all board policies and administrative bulletins available electronically on its website by January 2005.

DETAILED ACCOMPLISHMENTS**LEGAL EXPENDITURES MONITORED**

VISD effectively controls its legal expenditures. Because of the legal costs associated with contract review, property acquisition and disposal, property tax collections and appeals, and litigation, many school districts are experiencing dramatic increases

in their annual legal expenses. The rising cost of legal services, combined with a trend of increased litigation, is responsible for increases in the amounts school districts spend on legal services. It is important for school districts to establish mechanisms to control their legal expenditures.

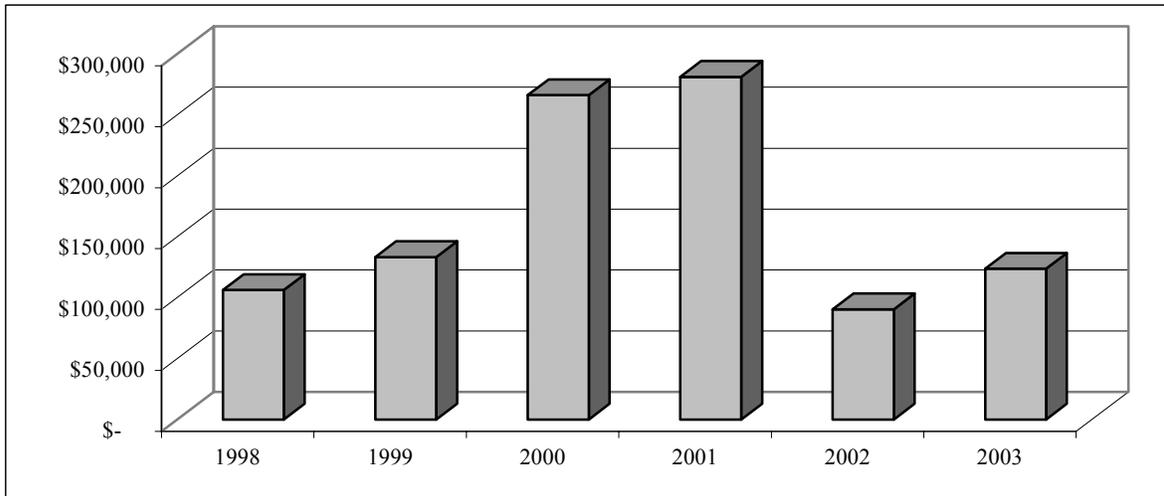
Exhibit 2-2 graphs VISD’s legal expenditures for the past five years. Although legal fees spiked in 1999–2000 and 2000–01 due to an increase in property tax protests, VISD has been able to keep its legal expenses relatively low.

Exhibit 2-3 compares VISD’s legal fees to those of

its peer districts. To make a valid comparison, the reviewers accounted for the difference in school district size; the peer comparison is presented as the amount expended for legal fees stated on a per pupil basis (legal expenditures divided by enrollment). As **Exhibit 2-3** shows, VISD’s per-student legal expenditures of \$8.65, which are higher than Lamar CISD and Wichita Falls ISD, slightly above Tyler ISD, and significantly lower than Bryan ISD. VISD’s per-student legal expenditures are 30.6 percent lower than the state average of \$12.46.

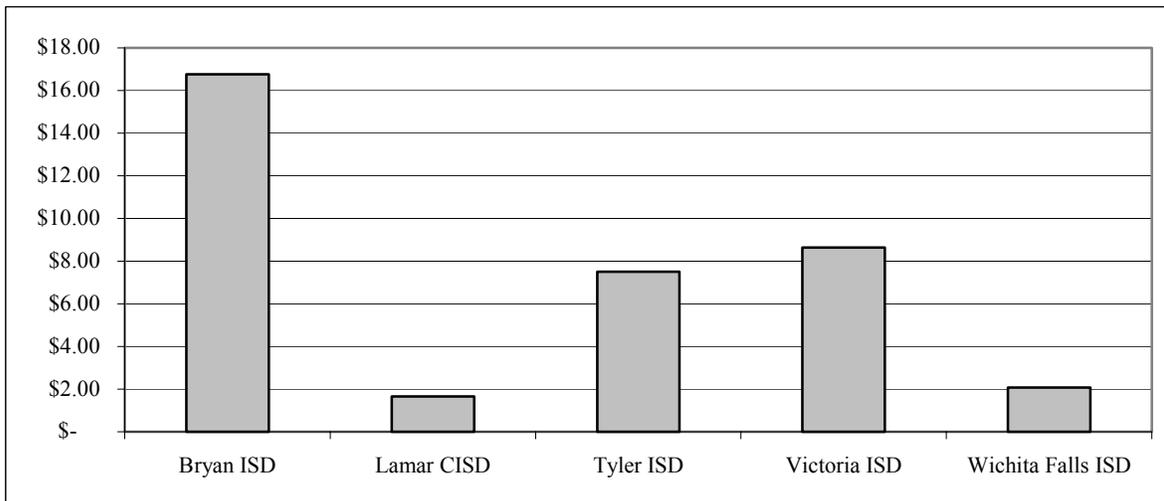
VISD uses several methods to control legal costs. It obtains legal services proposals every few years to

**EXHIBIT 2-2
VISD LEGAL EXPENSES
1997-98 THROUGH 2002-03**



SOURCE: Texas Education Agency, Public Education Information Management System (PEIMS), 1997-98 through 2002-03.

**EXHIBIT 2-3
VISD LEGAL EXPENDITURES AS COMPARED TO PEER DISTRICTS
2002-03**



SOURCE: Texas Education Agency, PEIMS, 2002-03.

ensure that the costs for its legal services remain competitive. The district also maintains an agreement with its general counsel that sets the hourly billing rates that the district will be charged. Before using the district's contracted attorney, VISD first consults with TASB's legal services, the cost of which is included in the district's annual membership dues. The district also requires personnel to go through the superintendent before contacting the attorney so that the superintendent can monitor the district's need for legal services. The superintendent reviews all legal bills prior to payment.

BOARD COMMUNICATION

VISD uses an effective mechanism for keeping employees informed of the results of board meetings. After each board meeting, the district's Communications specialist drafts a summary of board action items in a document named *Board Notes*. *Board Notes*, consisting of a one-page overview of board meeting events, are distributed to all employees the morning after board meetings. *Board Notes* is also placed on the district's website. The preparation and review of formal board minutes can take several days, so the use of *Board Notes* is a timely means of letting employees know of board actions or discussions that may affect them.

DETAILED FINDINGS

ORGANIZATIONAL STRUCTURE (REC. 16)

VISD's organizational structure has many related functions distributed throughout the organization, which result in a lack of accountability and efficiency in accomplishing district tasks (**Exhibit 2–4**). The assistant superintendent for Curriculum and Instruction is responsible for most instructional functions, including curriculum, federal and state programs, general education, gifted and talented education, bilingual/English as a second language education, and special education. The assistant superintendent for School Improvement, however, is responsible for instructional staff development, instructional technology, guidance counselor and principal supervision, and Career and Technology Education. Student disciplinary hearings, health services, and truancy fall under the assistant superintendent for School Administration. This organizational structure hinders accountability and efficiency since related functions fall to several individuals.

In addition to the instructional functions mentioned above, other functions that do not have appropriate accountability due to the organizational structure include technology, purchasing/warehousing, risk management, and safety and security. Management

Information Systems (MIS), which encompass all administrative and instructional technology responsibilities, reports to Curriculum and Instruction, while Information Technology reports to School Improvement.

The director of Plant Maintenance and Purchasing manages the district's Purchasing and Warehousing operations. Accountability over purchasing is compromised because the Purchasing functions are not independent of the organization's operations.

Risk management is under Plant Maintenance and Purchasing and not well coordinated with employee benefits nor does it have adequate oversight by the chief financial officer.

The district's organization also hinders responsibility and coordination for Safety and Security functions. The assistant superintendent for School Administration oversees the safety resource officers (SRO's), while the campus principals oversee daytime security guards. SRO's are city of Victoria police officers who provide services to the school district under a federal grant. The Plant Maintenance Department is responsible for the nighttime security guards.

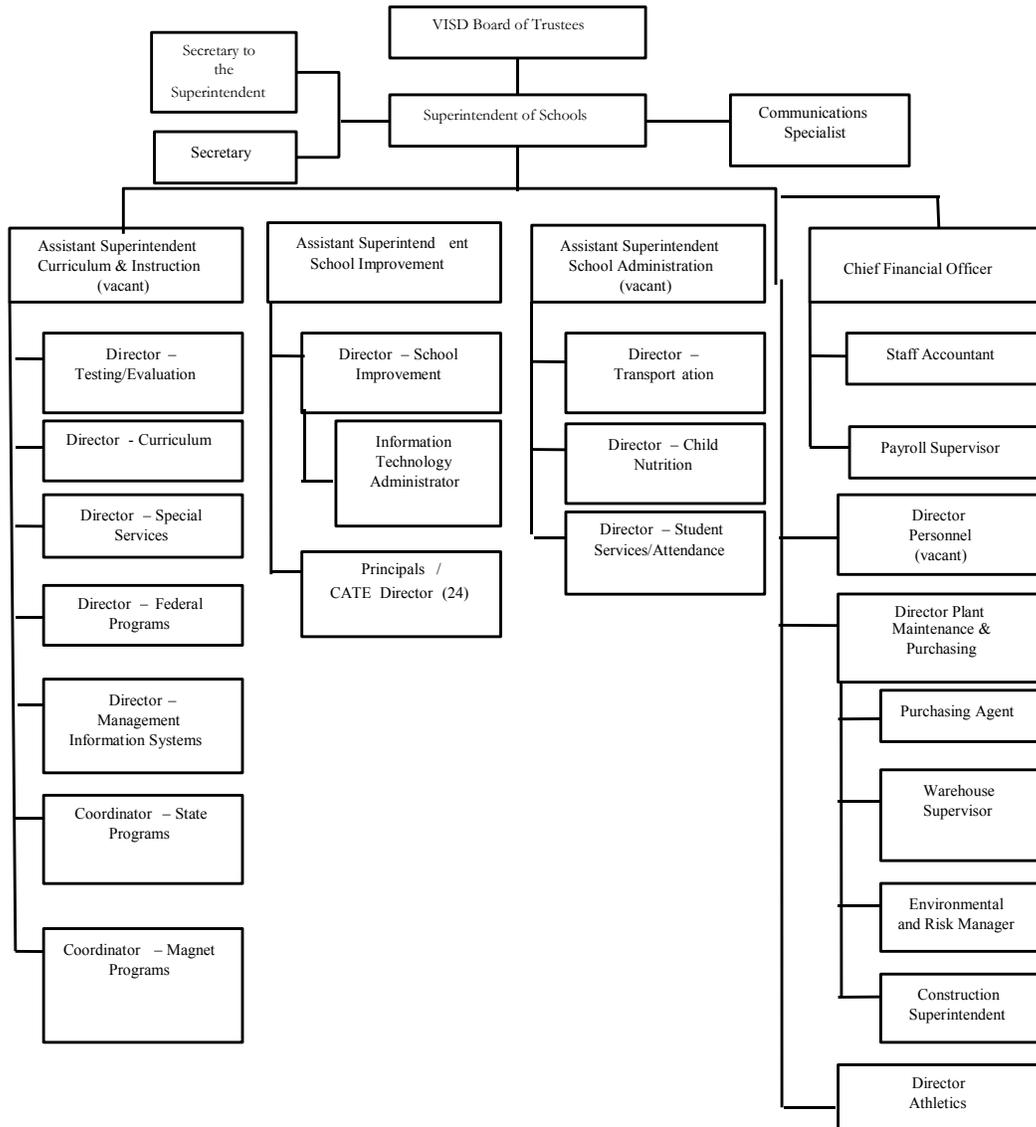
Compared to its peers, VISD is the second smallest district in terms of enrollment; however, it has the highest number of assistant superintendent (executive management) positions. Lamar ISD has 17,724 students and 2 assistant superintendents; Tyler ISD has 17,273 students, 1 assistant superintendent, and a deputy superintendent; and Bryan ISD has 14,104 students and 2 assistant superintendents. Wichita Falls ISD did not respond to a request for information.

To reduce administrative expenditures, many school districts are reorganizing and eliminating layers of management. For instance, Tyler ISD restructured its organization in 2003 and eliminated 11 positions, saving the district almost \$515,000 annually. In Tyler ISD, all assistant superintendent positions were eliminated and a deputy position was created and placed over all Curriculum and Instruction functions. Tyler ISD's new structure, while streamlining management, also places a stronger emphasis on instruction and consolidates the functions of Transportation, Food Services, and Purchasing under the Financial Services Department.

Exhibit 2–5 shows a proposed organizational structure for VISD.

VISD should restructure and replace the three assistant superintendent positions with a deputy superintendent. The total annual savings from implementing this recommendation is \$191,301

**EXHIBIT 2-4
VISD'S ORGANIZATION**



SOURCE: VISD organizational charts and interviews with VISD staff, April 2004.

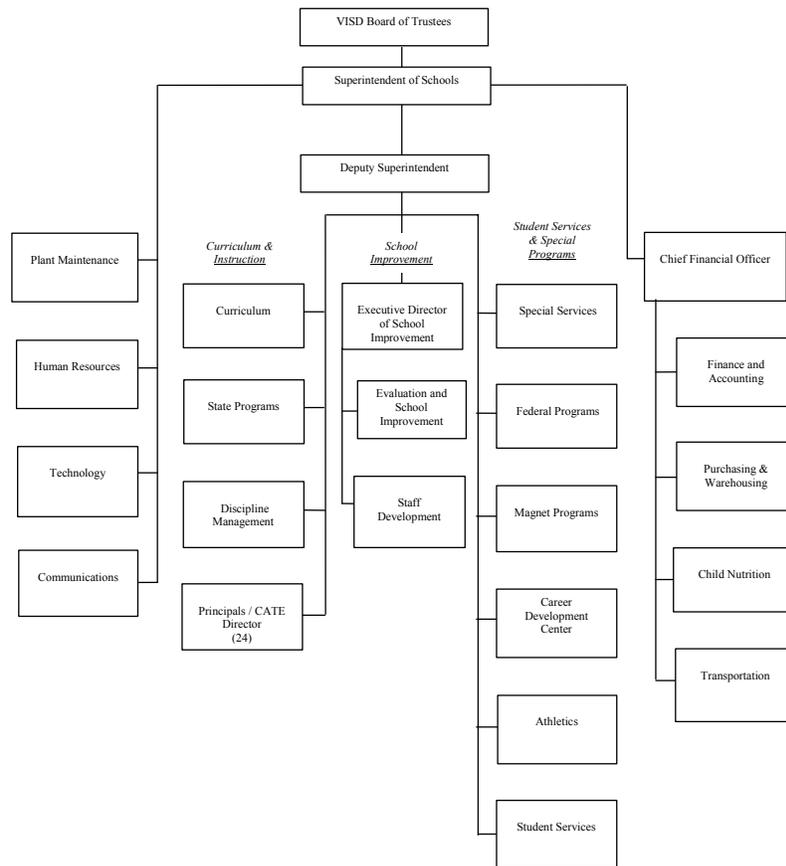
beginning in 2005–06. The savings from this recommendation includes the \$294,745 savings from the elimination of three assistant superintendent positions less the \$103,444 cost for the addition of the deputy superintendent position. The salary for a VISD assistant superintendent is \$92,946 annually, plus annual fixed benefits of \$2,700 for health insurance, and variable benefits of 2.8 percent of salary. The fiscal impact for eliminating three assistant superintendent positions is \$294,745 [(\$92,946 x 1.028 variable benefits) + \$2,700 fixed benefits] x 3 positions. The deputy superintendent position should have a starting annual salary of \$98,000. The fiscal impact calculation for adding the deputy superintendent would be \$103,444 [(\$98,000

x 1.028 variable benefits) + \$2,700 fixed benefits]. VISD would strengthen accountability and improve efficiency by eliminating the three assistant superintendent positions and creating a deputy superintendent position.

STAFFING STANDARDS (REC. 17)

VISD’s staffing standards for principal and assistant principal positions are not consistent with those established by the Southern Association of Colleges and Schools (SACS), the regional accrediting association. Compared to SACS standards, all the VISD elementary schools are overstaffed with assistant superintendents, while the high school Stroman campus is understaffed.

**EXHIBIT 2-5
VISD'S PROPOSED ORGANIZATIONAL STRUCTURE**



SOURCE: Gibson Consulting Group, Inc., June 2004.

VISD's staffing standards assign a principal to every school and allocate elementary school assistant principals at 1 per 400 students and secondary school assistant principals at 1 per 500 students. SACS recommends an assistant principal for every 263 students at the elementary level and an assistant principal for every 249 students at the secondary level. According to the SACS standards, the high school is overstaffed by one assistant principal at the Senior campus and understaffed by four assistant principals at the Stroman campus. The SACS standards use a higher student to staff ratio for assigning elementary school principal and assistant principals than does VISD. At the elementary schools the district has a total of 26 principal/assistant principal positions, however, SACS recommends 13.5, a difference of 12.5. The SACS standard for high schools adds an assistant principal for every 250 students more than 1,500 as needed, whereas VISD's staffing standard allocates one assistant superintendent for every 500 students.

Compared the to SACS standard, Stroman is understaffed by four assistant principal positions.

SACS accredits more than 12,000 public and private institutions, from pre-kindergarten through the university level, in more than 11 states in the Southern United States, including Texas, and Latin America. Member institutions are accredited through one of three SACS commissions: the Commission on Colleges, the Commission on Secondary and Middle Schools, and the Commission on Elementary and Middle Schools. The standards represent a common core of expectations that help develop and maintain quality schools.

Exhibit 2-6 shows the SACS standards for elementary, middle, and high school principals and assistant principals.

Exhibit 2-7 presents the staffing standards of VISD.

The following exhibit compares VISD's 2003-04 staffing levels to those established by SACS. The

**EXHIBIT 2-6
SACS ACCREDITATION STANDARDS FOR
CAMPUS PRINCIPALS AND ASSISTANT PRINCIPALS**

ENROLLMENT	PRINCIPAL	ASSISTANT PRINCIPAL
ELEMENTARY SCHOOL STAFFING STANDARDS		
1-263	0.5	0.0
264-439	1.0	0.0
440-659	1.0	0.0
660-879	1.0	0.5
880-1,099	1.0	1.0
1,100-1,319	1.0	1.5
1,320-up	1.0	2.0
MIDDLE SCHOOL STAFFING STANDARDS		
1-249	1.0	0.0
250-499	1.0	0.5
500-749	1.0	1.0
750-999	1.0	1.0
1,000-1,249	1.0	1.5
1,250-1,499	1.0	2.0
1,500-up	1.0*	2.0*
HIGH SCHOOL STAFFING STANDARDS		
1-249	1.0	0.0
250-499	1.0	0.5
500-749	1.0	1.0
750-999	1.0	1.5
1,000-1,249	1.0	2.0
1,250-1,499	1.0	2.5
1,500-up	1.0*	2.5*

SOURCE: Southern Association of College and Schools Checklist of Standards for the Accreditation of Elementary Schools, 2001-02; Southern Association of Colleges and Schools Additional Standards Unique to Middle Schools, 2001-02; Southern Association of Colleges and Schools High School Accreditation Standards, 2000.

• NOTE: Plus one FTE where needed for each 250 students over 1,500.

**EXHIBIT 2-7
VISD STAFFING STANDARDS FOR
CAMPUS PRINCIPALS AND ASSISTANT PRINCIPALS**

POSITION	ALLOCATIONS		
	ELEMENTARY SCHOOLS	MIDDLE SCHOOLS	HIGH SCHOOL
Principal	1 per campus*	1 per campus	1 oversees MHS (both the Senior and Stroman campuses)
Assistant Principal	1 per every 400 students	1 per every 500 students	1 per every 500 students
Associate Principal	N/A	N/A	1 per each campus

SOURCE: VISD Staffing Guidelines, Human Resources Department, January 31, 2002.

* NOTE: Exception is William Wood and Guadalupe Elementary Schools, each having 0.5 principal positions.

review team conducted the analysis by combining principal and assistant principal positions to determine a total staffing level standard. In doing so, overall staffing for principal and assistant principal positions in VISD schools is shown to be understaffed by 3 positions at the high school level, overstaffed at the middle school level by 1.5 positions, and overstaffed by 12.5 positions at the elementary school level. This analysis is presented in Exhibit 2-8.

By aligning its campus leadership staffing standards with the SACS recommended standards, VISD can

eliminate 12.5 elementary school assistant principals and 1.5 middle school assistant principals and add 3 high school assistant principal positions. The fiscal impact is estimated by using average salaries for assistant principals, \$44,949 for elementary positions, \$47,538 for middle school positions, and \$52,711 for high school positions. Variable benefits of 2.8 percent of base salary and annual fixed benefits of \$2,700 are also included. Eliminating 12.5 elementary school assistant principal positions results in a savings of \$611,345 ([\$44,949 average salary x 1.028 variable benefits] + \$2,700 fixed benefits x 12.5

EXHIBIT 2-8
CAMPUS ADMINISTRATION
VISD VERSUS SACS STANDARDS
2003-04

CAMPUS	ENROLLMENT	PRINCIPAL/ASSISTANT PRINCIPAL		
		VISD	SACS	OVER (UNDER)
Memorial High – Senior	1,614	4.5	3.5	1.0
Memorial High – Stroman	2,267	5.5	9.5	(4.0)
Total	3,881	10.0	13.0	(3.0)
Crain Middle	1,011	3.0	2.5	0.5
Howell Middle	1,066	3.0	2.5	0.5
Patti Welder Middle	1,056	3.0	2.5	0.5
Total	3,133	9.0	7.5	1.5
Aloe Elementary	553	2.0	1.0	1.0
Chandler Elementary	591	2.0	1.0	1.0
Dudley Elementary	521	2.0	1.0	1.0
FW Gross Elementary	499	2.0	1.0	1.0
Guadalupe Elementary	123	0.5	0.5	0.0
Hopkins Elementary	458	2.0	1.0	1.0
Juan Linn Elementary	457	2.0	1.0	1.0
DeLeon Elementary	606	2.0	1.0	1.0
Mission Valley Elementary	209	1.0	0.5	0.5
O'Connor Elementary	583	2.0	1.0	1.0
Rowland Elementary	497	2.0	1.0	1.0
Shields Elementary	646	2.0	1.0	1.0
Smith Elementary	519	2.0	1.0	1.0
Vickers Elementary	564	2.0	1.0	1.0
William Wood Elementary	120	0.5	0.5	0.0
Total	6,946	26.0	13.5	12.5
Grand Total	13,960	45.0	34.0	11.0

SOURCE: VISD staffing counts, Business and Finance Department, April 2004 as compared to SACS standards.

NOTE: SACS standards do not apply to alternative and specialized schools, so Mitchell Guidance Center, Profit Academic Center, and Coleto Creek Elementary were not included in this table.

positions). Eliminating 1.5 middle school assistant principal positions results in a savings of \$77,354 ([$\$47,538$ average salary x 1.028 variable benefits] + $\$2,700$ fixed benefits x 1.5 positions). Adding three assistant principal positions at the high school campuses results in a cost of \$170,661 ([$\$52,711$ average salary x 1.028 variable benefits] + 2,700 fixed benefits x 3 positions). The total fiscal impact of this recommendation is a net savings of \$518,038 ($\$611,345 + \$77,354 - \$170,661$) beginning in 2005-06.

STRATEGIC PLANNING (REC. 18)

VISD's strategic planning process is not well organized, focused, or grounded in data that supports its direction. Although district staff and the board have invested resources and energy into developing a strategic plan for the district and developed and prioritized recommendations for accomplishing the goals in the strategic plan, it has been unable to move forward in successfully

implementing the plan. The district lacks a structured process for moving forward with the plan.

VISD embarked on a strategic planning process in March 2001, when the board voted to hire the Texas Association of School Boards (TASB) to facilitate a strategic planning session. The decision to embark on this process was driven in part by the board and district's desire to come to some resolution regarding the perceived dissatisfaction surrounding the consolidation of the district's two high schools. In October and November 2001, TASB conducted four days of training and facilitation for the development of the strategic plan. A group of 37 people, including all of the board members, administration, community leaders, and parents participated in the four-day session. On December 13, 2001, the board voted to adopt its strategic plan. **Exhibit 2-9** presents VISD's strategic plan.

After the board adopted the strategic plan, the administration formed seven Innovative Research Teams (IRT's) to develop recommendations for

**EXHIBIT 2-9
VISD'S STRATEGIC PLAN**

OUR VISION	
OUR STUDENTS...	
Feel safe and secure in our schools.	Have a positive vision of their future and goals to achieve that vision.
Understand and practice democratic principles.	Are problem solvers who communicate effectively and achieve success in a competitive, multicultural society.
Graduate from high school prepared for post-secondary education or a career path.	Have a passion for learning.
Appreciate culture and beauty.	Participate in activities that build pride in their schools and community.
Have a sense of belonging and pride in their schools and community.	Are kind, giving individuals who actively contribute to our community.
OUR LEARNING ENVIRONMENT...	
Stretches beyond classroom walls to serve the needs of all students.	Offers diverse programs and curricula that set the standards of excellence for the global community.
Engages home and schools as full partners in the educational process.	Is staffed and led by world-class educators with a love for learning and a level of skills second to none.
Has safe, functional, and aesthetically pleasing facilities.	Is equipped to meet the needs of all students.
IN THE SUPPORTING ENVIRONMENT...	
The community consistently celebrates the academic accomplishments of all students.	The district partners with higher education institutions to ensure that all students are prepared to continue their education.
The community expects and makes it possible for every student to graduate.	Numerous opportunities exist for students at all levels to interact with and learn from community leaders and volunteers.
The community understands the importance of and provides the resources to produce world class schools.	The community and district actively work together to share information and expectations.
We work together in good will and unity to provide a quality education.	
OUR VALUES	
WE BELIEVE THAT...	
Everyone is entitled to be treated with respect.	The family is the foundation of learning.
A supportive home environment encourages learning.	Shared moral values are a foundation for ethical behavior.
Spiritual faith provides positive moral structure in our lives.	All people are entitled to an opportunity to achieve their full potential.
Our strong work ethic fosters community prosperity and growth.	A well-educated population is vital to our future as a productive community.
Our children deserve a healthy and safe learning environment.	Every child can learn.
All children are entitled to a well-rounded educational experience that fully prepares them to succeed in life.	
OUR MISSION	
The mission of Victoria ISD, as the primary provider of public education through grade 12, is to educate students through the delivery of a comprehensive, standards-based curriculum so that our graduates become contributing members of society.	
STRATEGIC GOALS	
VICTORIA ISD HAS:	
Goal #1: A safe and secure learning environment.	Goal #2: A dynamic, highly qualified professional staff successfully teaching a real-world curriculum.
Goal #3: Campuses and facilities organized as centers of community collaboration and learning, efficiently meeting student and community needs and expectations.	Goal #4: An integrated and aligned curriculum focused on real-world applications.
Goal #5: A student body that exhibits pride in school and is fully engaged in its school and community.	Goal #6: A comprehensive program to integrate technology throughout the district.
Goal #7: Effective, open dialogue between the district and the community.	
STUDENT OUTCOMES	
By 2007, 100 percent of our students will successfully graduate from high school as evidenced by their receipt of either a high school diploma or a GED.	By 2007, 100 percent of our graduates will be either enrolled in post-secondary education or working on a career path or a combination of both.
Throughout their school years, students will work collaboratively in diverse teams to perform various tasks that require skills in teaching, leading, arriving at consensus, negotiating, speaking and listening, and thinking creatively.	By the end of the 8th grade, the student will gain basic skills in the use of e-mail, browsers, word processing, spreadsheets, presentation and other applicable software tools.

EXHIBIT 2-9 (CONTINUED)
VISD'S STRATEGIC PLAN

STUDENT OUTCOMES	
By the end of the 8th grade, the student will have a vision of their future, identified goals, and annually update their plans to achieve that vision.	By the end of the 11th grade, all students will integrate and demonstrate advanced capability with current technology tools by completion and presentation of a research project.
Students will demonstrate leadership and citizenship skills by participating in middle and high school activities/community projects and completing a service learning project.	

SOURCE: VISD Strategic Plan, May 2004, www.visd.com/links/strategic.htm.

In February 2003, the board formed a new committee to help administration gather data to help make a final decision on high school configuration. The new committee was named the Strategic Plan Implementation - High School Configuration Committee and met for the first time on February 17, 2003. The committee comprises three board members and representatives from administration. An original timeline set July 2003 as the month for a board vote on configuration.

At a September 18, 2003 meeting, the board held a lengthy discussion on the purpose and role of the committee and, in November 2003, voted to approve a resolution expanding the scope of the Strategic Plan Implementation - High School Configuration Committee to include a configuration study of all the districts' schools.

The strategic planning effort in VISD is not tied in with a formal evaluation mechanism and/or data to support decisions. For example, during the September 18, 2003 board meeting, board members disagreed over actual enrollment declines for the high school, with one member stating that enrollment has declined by over 600 students and another member claiming declines of only 100 to 200 students. In spite of these disagreements, a board member at this meeting stated he wanted to see a bond election for a new 3A high school, to be named after a former local educator. Furthermore, five out of seven board members interviewed by the review team stated the district's need to build a new high school in spite of the lack of demographic or other studies on enrollment patterns.

Although the district has re-stated the purpose of its Strategic Plan Implementation - High School Configuration Committee to include a consideration of all the needs in the district, interviews with board members indicate that the primary focus is still on the high school configuration.

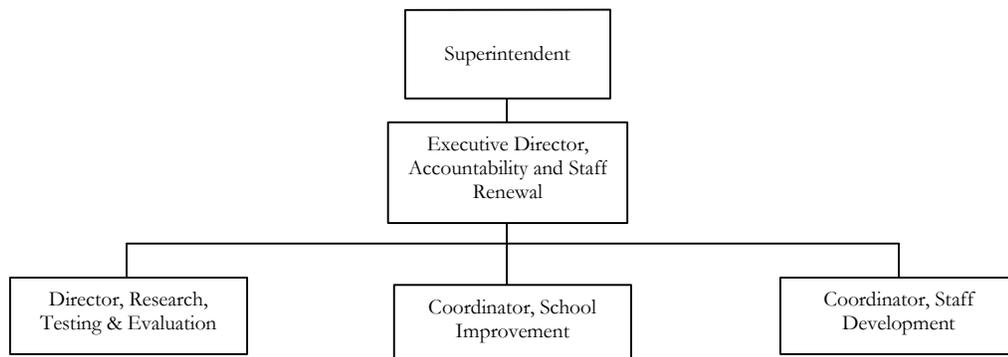
The issue of high school configuration has become such a center of focus for the district that other critical issues are being overlooked, including technology needs, safety and security concerns, and facilities. The district has a Technology Plan in place, but the board has not developed a plan of action to

implement much needed improvements in the number and condition of computers available for student use. Similarly, the district does not have a comprehensive facilities master plan to help it address its long term needs and be better prepared to provide adequate and affordable facilities for VISD students.

In a review of processes and practices for implementing and sustaining strategic planning efforts in public schools, the review team found a best practice in use in Collier County Public Schools (CCPS) in Florida. CCPS has consolidated its long-range planning efforts with its research, evaluation, and staff development functions. CCPS's Accountability and Staff Renewal Department is depicted in **Exhibit 2-10**.

Although all departments in CCPS are responsible for and participate in the long-range planning and monitoring functions in the district, the executive director of Accountability and Staff Renewal is in charge of making sure that district staff receives adequate training on developing, implementing, and monitoring its strategic plan and overseeing and guiding the process. The executive director is also responsible for ensuring the district's long-range strategic plan is based on accurate research and data and student outcomes are included in long-range plans. The coordinator for School Improvement is responsible for ensuring that schools make proper use of their site-based decision-making committees and reviewing and approving all campus improvement plans. Finally, the coordinator for Staff Development in CCPS uses the results of the program evaluation process and the long-range planning process to develop and implement staff development for district employees.

EXHIBIT 2-10
COLLIER COUNTY, FLORIDA PUBLIC SCHOOLS
DEPARTMENT OF ACCOUNTABILITY AND STAFF RENEWAL



SOURCE: Collier County, Florida Public Schools, Department of Accountability and Staff Renewal, May 2004.

By creating a unit to coordinate and oversee the district's planning process, the district can better focus its long-term planning and ensure that plans are based on district needs. The district should create an executive director of School Improvement position that would be responsible for overseeing long-range district planning, campus-based planning, evaluations, and staff development.

The fiscal impact for this recommendation includes the salary and benefits for an executive director position. Using VISD's salary schedule for a pay-grade 8, the salary is estimated to be \$92,470 (pay-grade 8; 14-19 years experience; 262 days). Effective in 2005-06, the annual fiscal impact would be \$97,759 (\$92,470 base salary x \$1.028 variable benefits + \$2,700 fixed benefits). Assuming the recommendation is implemented in January 2005 the cost for 2004-05 would be \$65,173 (\$97,759/12 x 8).

BOARD TRAINING (REC. 19)

The district lacks a process to monitor board training. As a result, some VISD board members lack the required number of training hours and/or training in required topics. The Texas Administrative Code (TAC) requires board trustees to complete specified training annually. Continuing education for board members includes orientation sessions; annual team-building efforts, including all board members and the superintendent; and specified hours of continuing education based on identified needs. The TAC requires new board members to receive a local district orientation within 60 days of joining the board and an orientation to the Texas Education Code (TEC) within one year of election or appointment to the board. Training opportunities are available to Texas school board members through

the Texas Association of School Boards (TASB), Regional Education Service Centers, and other organizations. Training requirements for board members, as published by TASB, reflect Texas Administrative Code, Title 19, Chapter 61.1. **Exhibit 2-11** is an overview of the Continuing Education requirements for board members.

The table in **Exhibit 2-12** shows a summary of training hours by board member for 2001, 2002, and 2003. This table also lists the deficiencies, if any, in training requirements.

According to board member training records, past Team Building training has been held on April 20, 1998; June 14, 1999; October 12, 2000; and January 30, 2002. The timing of these sessions, except for the June 1999 session, does not allow new board members elected in May to participate in the Team Building training.

Ensuring that individual board members receive adequate continuing education is imperative to having an informed board that stays abreast of the most recent laws and regulations regarding education law and practices. Team Building training is also important because it helps to ensure that the board and superintendent are able to work together to address and solve difficult problems in ways that are effective and constructive.

Many school districts in Texas establish a training calendar that details the requirements for each board member. Usually, a district staff member is responsible for maintaining the calendar, and the district's superintendent is responsible for informing the board of needed training hours and identifying training opportunities for board members. By establishing such a practice, VISD will comply with

**EXHIBIT 2-11
OVERVIEW OF CONTINUING EDUCATION REQUIREMENTS
FOR SCHOOL BOARD MEMBERS**

TYPE OF CONTINUING EDUCATION	FIRST-YEAR BOARD MEMBER	ANNUAL REQUIREMENTS OF EXPERIENCED BOARD MEMBER
Orientation to the TEC	3 hours	Not required
Update to the TEC	Incorporated into orientation to the TEC	After legislative session: of sufficient length to address major changes
Team-building Session/Assessment of Continuing Education Needs of the Board-Superintendent Team	At least 3 hours	At least 3 hours
Additional Continuing Education, based on assessed need and Framework for School Board Development	At least 10 hours	At least 5 hours
Total Minimum Number of Hours	16 hours, plus local district orientation	8 hours, plus update

SOURCE: Texas Association of School Boards, Leadership Team Services, April, 2004.

**EXHIBIT 2-12
VISD BOARD OF TRUSTEES' SUMMARY OF TRAINING HOURS**

BOARD MEMBER	CONTINUING EDUCATION HOURS			DEFICIENCIES
	2001	2002	2003	
Bernard Klimist ⁽¹⁾	N/A	N/A	22.25	No Team Building training in 2003
Loleat Ross	51.25	18.75	19.25	No TEC orientation in first year and inadequate Team Building hours in 2001 and 2003
Laura Smith	102.25	50.00	4.00	No local orientation in 2000; no Team Building hours in 2003; insufficient hours in 2003
Milton Stoilis	36.00	10.50	20.75	No Team Building training in 2001 or 2003
Ludvik Svetlik ⁽²⁾	N/A	23.00	13.50	No local orientation; no TEC orientation; no Team Building in 2002; no Team Building in 2003
Bobby Trevino	52.50	5.00	4.00	No Team Building in 2001; no team building in 2003; insufficient hours in 2002 and 2003
Ray Walden	47.25	15.50	7.25	No TEC orientation in 2001; no Team Building training in 2001; no Team Building training in 2003
Rosalinda Valderrama ⁽³⁾	29.00	9.50	N/A	No TEC orientation in 2001; no Team Building in 2001

SOURCE: VISD's board training records, Superintendent's Office, 2001-2003.

NOTES: ⁽¹⁾ Appointed in 2003.

⁽²⁾ Elected in 2002.

⁽³⁾ Resigned in 2003.

state requirements and help ensure the board stays informed of state laws and regulations.

TRAVEL POLICY (REC. 20)

VISD does not ensure that its travel expenses are in compliance with state law. Travel records for board members and the superintendent show that in some cases the district advances spousal travel expenses, which is in violation of state law. While the board members and superintendent reimbursed the district, VISD advanced the funds for personal travel expenses.

Board policy BBG (Legal) states, "The Board may not pay the travel expenses of spouses and other persons who have no responsibilities or duties to perform for the Board when they accompany Board members to Board-related activities." The policy does not specifically prohibit the district from advancing personal travel expenses with the

understanding that the district employee or board member will reimburse the district.

The review team examined travel records for all board members and the superintendent from 2001 through 2004. The travel records were well organized, with all receipts and travel reports filed in their proper files.

Board members and administrators are usually provided a travel advance based on a calculation of estimated travel expenses. Upon completing travel, the board member and administrators either submits expense receipts for additional reimbursement in the event that the travel advance did not fully cover the travel expenses or submits a personal reimbursement check along with a summary of travel expenses to the district in the event that the travel advance exceeded actual expenditures.

Exhibit 2-13 shows a list of the spousal travel expenditures initially paid by the district.

While these amounts are not material, and in all cases they were reimbursed to the district, this practice is considered inappropriate. Article III, Section 52 (a) of the Texas Constitution states that "...the Legislature shall have no power to authorize any county, city, town, or other political corporation or subdivision of the State to lend its credit or to grant public money or thing of value in aid of, or to any individual, association or corporation whatsoever..." The practice of charging personal expenses to the district could be interpreted as lending credit to an individual, as described in this article.

VISD should clarify its board policy to clearly state that only board members and district employees are eligible for travel advances to help the district ensure it complies with the state law.

BOARD MEETINGS (REC. 21)

VISD board meetings are not efficient, frequently going until 10 or 11 PM, with some meetings lasting until midnight or later. Regular board meetings average four hours and usually begin at 6 PM. In addition, the board calls special meetings throughout the year for the purpose of holding budget workshops, to swear-in new members, or to handle business items that develop between regular meetings.

Regular board meetings usually begin with student recognitions or student presentations, followed by staff awards for employee of the month. Many times, the actual business of the board doesn't begin until

an hour or more after the meeting has been called to order.

Exhibit 2-14 presents a summary of the average time for board meetings in addition to the number of regular and special meetings held.

Board meetings are lengthy mainly due to numerous special recognitions and/or award presentations and lengthy discussion of board issues that are complex or controversial.

While award presentations and employee recognition are important in building and maintaining student, teacher, and employee morale, these things are best accomplished in ways that do not interfere with or delay the business of the board. At the same time, having detailed public discussions on important issues is also critical to running a school district, but, again, these discussions would be more appropriate during settings other than board meetings.

Many school districts conduct board meetings more efficiently and effectively. Some of the strategies include the following: creating timed meeting agendas; establishing venues other than board meetings to hold awards ceremonies; and using information exchange settings such as Committee of the Whole meetings.

In creating a timed agenda, the board president and superintendent can determine in advance how long a meeting will take, and, if necessary, adjust the agenda so that meetings can be kept to a reasonable amount of time. In addition, knowing in advance how long

**EXHIBIT 2-13
VISD'S TRAVEL RECORDS SHOWING
SPOUSAL TRAVEL PAID BY THE DISTRICT
2001-2004**

DATE(S) OF TRAVEL	PURPOSE OF TRAVEL	DESTINATION	DESCRIPTION	AMOUNT
3/23-3/27/01	National Conference	San Diego, CA	Spouse travel	\$497.50
3/23-3/27/01	National Conference	San Diego, CA	Spouse travel	497.50
3/23-3/27/01	National Conference	San Diego, CA	Spouse travel	497.50
4/5-4/10/02	NSBA Conference	New Orleans, LA	Spouse travel	203.00
3/26-3/30/04	National Conference	Orlando, FL	Spouse travel	287.20
Total				\$1,982.70

SOURCE: VISD travel records, Office of the superintendent, for the years indicated.

**EXHIBIT 2-14
VISD BOARD MEETING AVERAGE TIMES**

YEAR	AVERAGE LENGTH	NUMBER OF REGULAR MEETINGS HELD	NUMBER OF SPECIAL MEETINGS HELD
2001	3 hours, 45 minutes	12	7
2002	3 hours, 42 minutes	12	8
2003	4 hours, 51 minutes	12	8
2004 (through May)	4 hours, 54 minutes	5	2

SOURCE: VISD board meeting minutes, Superintendent's Office, 2001 through 2004.

an item is scheduled for discussion and what is to be accomplished within a specific time frame will help other board members gauge comments. Prior to the start of a meeting, board members can negotiate the time allotted to items if they so desire.

Some school districts are also holding staff and student presentation and award ceremonies at meetings other than official board meetings. One effective way of doing this is to hold rotating Town Hall meetings at different campuses throughout the year. This allows individual schools to be highlighted and their students and staff recognized. Town Hall meetings serve a dual purpose of providing and receiving information from the public on important topics such as budgets, facilities, strategic plans, student achievement, and special initiatives. Many school districts hold meetings similar to those of Town Hall with the superintendent and one or two board members in attendance.

Districts such as Houston ISD that use a Committee of the Whole structure rather than permanent board committees or standing committees are able to efficiently provide detailed information to board members. Committee of the Whole meetings include all board members so that everyone benefits from the information exchanged. These meetings are usually held prior to board meetings that have important or complex issues to be decided, giving board members a chance to become informed and ask questions; no board directives are issued at these committee meetings. If used effectively, these meetings allow the subsequent board meeting to run more smoothly since all board members have already been informed of the issues and given opportunities to ask questions or hold discussions.

VISD should adopt some of these strategies to make its board meetings more efficient and effective. The board president and the superintendent should discuss options to make more efficient use of regular board meetings. The board president should present a proposal for changes to the entire board by December 2004, to take effect in January 2005.

BOARD POLICIES (REC. 22)

VISD board policies are not available in an electronic format, thus they are not available on the district's web site, making access to the policies difficult. The district has placed some administrative bulletins on its web site, but they are incomplete and have no search capabilities.

VISD has a contract for policy development with the Texas Association of School Boards. Any policy designated in the policy manual as "Legal" has been developed by TASB to comply with state and local laws. Local policies developed by or for the district to reflect decisions of the local board are designated as "Local." Policy updates are issued by TASB on a regular basis for local review to ensure that the district's policies remain current. VISD has a policy committee whose role is to review, revise, and draft policies prior to submission to the board for adoption. VISD's secretary to the board serves as policy administrator and is responsible for maintaining and updating policy manuals in the district.

Having board policies in an electronic format provides many benefits including the following: immediate access to policies by all employees and members of the public; ability to search policies for key words or phrases; reduces the amount of time district staff must spend on maintaining and updating hard copy policy manuals; ensures that all employees have access to the most current policies; and reduces the amount of money spent on duplicating paper copies of the policy manual.

VISD should contract with TASB to automate its board policy manual and it should complete the placement of administrative bulletins on the web site. TASB charges a first year fee of \$1,700 for installation and maintenance and a \$750 maintenance fee for subsequent years. The district should have all board policies and administrative bulletins available electronically on its website by January 2005.

For background information on District Leadership, Organization, and Management, see p. 187 in the General Information section of the appendices.

FISCAL IMPACT

RECOMMENDATION	2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE- TIME (COSTS) OR SAVINGS
CHAPTER 2: DISTRICT LEADERSHIP, ORGANIZATION, & MANAGEMENT							
16. Restructure the district's organization and replace the assistant superintendent positions with a deputy superintendent to strengthen accountability and efficiency.	\$0	\$191,301	\$191,301	\$191,301	\$191,301	\$765,204	\$0
17. Amend campus leadership staffing standards to make more efficient use of personnel.	\$0	\$518,038	\$518,038	\$518,038	\$518,038	\$2,072,152	\$0
18. Create a function in VISD to coordinate and oversee the strategic planning process and ensure that it is linked to the evaluation and staff development functions.	(\$65,173)	(\$97,759)	(\$97,759)	(\$97,759)	(\$97,759)	(\$456,209)	\$0
19. Establish training calendars for each board member to ensure that the district complies with state training requirements.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
20. Develop a local district policy on advances for travel expenses.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21. Develop strategies to make VISD board meetings more efficient and effective.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
22. Contract with the Texas Association of School Boards to automate VISD's board policy manual and complete the placement of administrative bulletins on the website.	\$0	(\$750)	(\$750)	(\$750)	(\$750)	(\$3,000)	(\$1,700)
Totals-Chapter 2	(\$65,173)	\$610,830	\$610,830	\$610,830	\$610,830	\$2,378,147	(\$1,700)

CHAPTER 3

COMPUTERS AND TECHNOLOGY

Technology capability in any school district should positively contribute to the classroom and administration. School districts address technology in a variety of ways. Regardless of their size and organizational structure, most districts include the following technology functions: management and oversight of the entire district's instructional and administrative applications; hardware and software maintenance of these applications; planning, implementation, and oversight of local area networks; and a wide area network and training and technical support for computer applications and networks.

The district currently has 4,513 computers and an equal number of peripheral devices, such as printers, scanners, digital cameras, etc. Five computer technicians, one network technician, and a part time network administrator provide technical support. The computer technicians are responsible for diagnosing problems and repairing all computer hardware and peripherals in the district. The network technician is responsible for maintaining the network hardware and pulling cabling as requested by campuses and departments. The Management Information Systems (MIS) Department also has one help desk clerk. The clerk initiates and tracks work orders and notifies users of their work order status using the district's automated work order system. Additionally, the district's Technical Support plays a crucial part in the implementation of technology related district projects, such as the district wide anti-virus software, grade book software, and other applications.

ACCOMPLISHMENTS

- VISD engaged in partnerships with other educational and governmental institutions in the Victoria area to provide enhanced wide area network infrastructure for the district.

FINDINGS

- VISD lacks the number and quality of instructional computers to support student learning. Its student-to-computer ratio of six to one is greater than the state recommended ratio of four to one. Fifty percent of the current instructional computers are more than four years old and some are up to 10 years old.
- With a computer-to-technician ratio of 752:1, the district's technical support staff is unable to adequately meet demands for service.
- VISD's Management Information Systems Department does not have a disaster recovery plan that would protect the district from losing crucial data in the event of an emergency.

- VISD does not have the technical policies and procedures it needs to operate effectively. As a result, the district currently has at least 17 different operating systems that need to be maintained.

RECOMMENDATIONS

- **Recommendation 23 (p. 42): Improve the student-to-computer ratio to meet state recommendations and implement a replacement plan for older computers.** The district should develop a purchasing plan to achieve a student-to-computer ratio of four to one by 2009. In addition to increasing the number of computers, the district should implement a four-year replacement cycle for the existing computers and replace one-fourth of the total computer inventory every year starting in 2005–06.
- **Recommendation 24 (p. 43): Hire two additional technical support staff.** Two additional technicians will reduce the district's computer to technician ratio from 752:1 to 564:1 bringing it closer to the state's recommended ratio of 500:1 and enable the MIS Department to more effectively and promptly meet demands for service.
- **Recommendation 25 (p. 44): Develop, implement and annually test a disaster recovery plan.** A comprehensive disaster recovery plan will help the district recover technology operations more quickly should a disaster occur. VISD can review disaster recovery plans available from Region 3 and other school districts for ideas on how to develop its own plan.
- **Recommendation 26 (p. 45): Develop and document all technology policies, procedures and standards.** The MIS Department should create and document policies, procedures, and standards. Once the district's technology committee approves them, they should be posted on the district web site for easy access by all staff involved in the purchase of technology equipment and software. The technology committee should periodically review and update the information.

DETAILED ACCOMPLISHMENTS

COMMUNITY PARTNERSHIPS

The district's MIS Department partnered with other Victoria entities to enhance the district's wide area network (WAN) infrastructure and achieve savings. In 2000, the MIS Department discovered that both

the City of Victoria and VISD had T-1 connections to the Juvenile Detention facility located at the Victoria Airport. In order to eliminate duplicate effort and save taxpayers money, the entities joined efforts.

In 2001, VISD, in conjunction with the City of Victoria, Victoria College, University of Houston at Victoria, Victoria County, Victoria Public Library, Citizen's Medical Center, and Gulf Bend MHMR applied for and received a grant from the Telecommunications Infrastructure Fund (TIF) to establish the Victoria Area Network (VAN), a community network.

VAN built a common network using wireless and fiber technology that is accessible from most areas in the City of Victoria and Victoria County. The wireless network backbone is a 45-megabit per second licensed frequency. There are two towers, each with six multi-point antennas.

Dudley, O'Connor, and Shields elementary schools are connected to the VAN by a wireless connection. Each of these connections provides wireless connectivity to a homework center, a community center, and a Boys and Girls Club.

Regional Education Service Center III (Region 3) joined the VAN in 2003. All entities agreed to work through the VAN in planning wide area network and wireless projects to ensure that all entities benefit from each other's projects.

DETAILED FINDINGS

AGING COMPUTERS (REC. 23)

The district does not have the number and quality of instructional computers to support learning and has not implemented a plan for replacing district computers as they age. It has a total 3,828 computers on school campuses. Teachers and administrative staff use 1,324 of these computers. The remaining 2,504 computers are used for instruction. TEA recommends a student-to-computer ratio of four to one. According to the district's Technology Plan, VISD has a student-to-computer ratio of six to one based on a student enrollment of 14,439 and 2,504 instructional computers. The student-to-computer ratio based on the computers that are four or less

years old is 11 to 1. In addition, 50 percent of the district's instructional computers are more than four years old and some are up to ten years old. An analysis of the district's computer inventory also shows that less than 25 percent of the district's instructional computers are considered new (two years old or less). Many of the computers that are older than four years may not be capable of running the instructional applications that the secondary schools are using. For example, the district's two high school libraries have some of the oldest computers in the district, making it difficult for students to conduct Internet-based research and access their e-mail accounts. Both libraries have access to several online databases. However, these tools are underutilized due to the lack of adequate computers. It is frustrating to the librarians and students that several computers crash or are out of commission on a daily basis.

Exhibit 3-1 compares VISD student-to-computer ratios for all computers used for instruction with its peer districts. VISD has the highest student-to-computer ratio among its peers.

The MIS Department proposed a replacement cycle plan for the district's instructional computers in the summer of 2003. The plan has a four-year replacement cycle for high schools, five-year cycle for middle schools, and six-year cycle for the elementary schools. The proposed plan did not address the replacement of the non-instructional computers, and the instructional components of the plan have not been implemented.

Making technology a viable instructional tool requires schools to have sufficient numbers of computers so that each student can have full and easy access to a computer. TEA created a Long-Range Plan for Technology for 1996–2010, which set goals for the number of computers for each student in Texas classrooms. In the plan, TEA sets short-term goals for 2003–2004, mid-term goals for 2005–07, and long-term goals for 2008–2010. The plan states that school districts benefit the most by implementing and maintaining the suggested ratios of workstations to students and educators and by determining how best to deploy the workstations to

EXHIBIT 3-1

VISD VS. PEER DISTRICTS MAY 2004

DISTRICT	ENROLLMENT	NUMBER OF INSTRUCTIONAL COMPUTERS	STUDENT TO COMPUTER RATIO
Victoria	14,439	2,504	6:1
Tyler	17,096	5,200	3:1
Lamar	17,063	5,098	3:1
Bryan	13,907	5,500	3:1
Wichita Falls *	N/A	N/A	N/A

SOURCE: Peer district surveys and VISD 2004–2006 Technology Plan, May 2004.
*No response to the peer survey.

ensure universal accessibility. The plan’s short-term goal is a student-to-workstation ratio of four to one, while the mid to long-term goal is a student-to-workstation ratio of one to one.

VISD should purchase instructional computers to meet the state’s short-term goal of one computer per four students, and it should replace the districts existing computers over a period of four years. A good quality, commercially available personal computer designed to meet educational computing needs costs approximately \$1,100.

To bring the student-to-computer ratio up to state recommendations, VISD will need to purchase 1,106 computers (14,439 students divided by four equals 3,610 computers minus 2,504 existing instructional computers = 1,106). Lowering the student-to-computer ratio to four to one in four years will cost the district \$304,150 annually (\$1,100 x 1,106 computers = \$1,216,600/4 years).

To replace the district’s existing computer inventory over four years beginning in 2005-06 will cost approximately \$5 million. To replace one-fourth of the district’s aging computers per year will cost \$1,240,800 (4,513 computers/4 years = 1,128 computers x \$1,100 per computer).

Implementing this recommendation will cost the district approximately \$1,544,950 annually (\$1,240,800 + \$304,150).

TECHNICAL SUPPORT (REC. 24)

Technical support is inadequately staffed to meet the demands for its services. According to the MIS director, the average turnaround time for a reported technical problem is approximately 23 days.

The MIS Department has five full-time service technicians and one help desk clerk to meet the technical support needs of the district’s 24 campuses and five administrative buildings. The same group of technicians is also responsible for implementation of several district-wide systems. The district’s computer-to-technician ratio of 752:1 limits the

district’s ability to effectively support technology and meet district-wide technology implementation project deadlines.

According to the *Michigan Technology Staffing Guidelines* developed in 2000 by the Michigan Department of Education, there are several factors in addition to the number of computers, software types, teachers, and students that may increase a district’s need for technology staffing. These factors include the following:

- large geographical size;
- more than 10 buildings;
- old or badly wired buildings;
- computers more than two years old;
- a wide variety of brands, models, and types of computers;
- non-centralized computer software installation;
- non-centralized computer maintenance; and
- significant usage of technology based curriculum and/or distance learning.

At least four of these factors apply to VISD, including the following:

- twenty-four campuses and five administration buildings;
- fifty percent of the district’s computers older than four years;
- two types of platforms, Mac and PC-Windows based computers from three to four different vendors;
- sixteen different operating systems; and,
- a significant number of portables and old buildings.

Exhibit 3-2 shows that Victoria ISD has the highest computers to support staff ratio among its peers. TEA recommends at least one technical staff to 500 computers.

The district should hire two additional technical support staff members at an annual cost of \$60,388 to meet the district’s need for technology services. This amount is calculated using an hourly rate of

**EXHIBIT 3-2
VISD VS. PEER DISTRICTS
MAY 2004**

DISTRICT	NUMBER OF COMPUTERS	TECHNICAL SUPPORT AND HELP DESK STAFF	COMPUTER TO SUPPORT STAFF RATIO
Victoria	4,513	6	752
Tyler	7,000	11	636
Lamar	5,950	11	541
Bryan	5,950	12	496
Wichita Falls	N/A	N/A	N/A

SOURCE: Peer district surveys and VISD organization chart, May 2004.

\$12.76, which is midpoint pay-grade 5 on the hourly pay scale. Similar VISD positions are scheduled to work 262 days per year, making the annual salary for each of these recommended positions \$26,745 (262 days x 8 hours per day x \$12.76). With variable benefits of 2.8 percent and fixed benefits of \$2,700 annually, the total salary and benefits for one position is \$30,194 ($[\$26,745 \times 1.028] + \$2,700$). Because the two positions ($\$30,194 \times 2 = \$60,388$) will not be filled until January 2005, the first year's fiscal impact will only be \$40,259 ($\$60,388 / 12 \times 8$).

DISASTER RECOVERY (REC. 25)

The MIS Department does not have a disaster recovery plan. If a catastrophic event occurs, such as a hurricane, flood, fire, or vandalism, the district's data could be lost. In addition to the loss of data, the district would not be able to perform important operational and reporting functions such as payroll, accounts payable, or timely Public Education Information Management System (PEIMS) reporting until the original systems were restored.

Essential elements of a disaster recovery plan include a disaster recovery team; a list of persons to contact after a disaster; and a listing of critical school functions, essential office equipment, and required staffing levels needed immediately after a disaster.

Exhibit 3-3 presents all the key elements of a comprehensive disaster recovery plan.

The Glen Rose Independent School District (GRISD) has developed a comprehensive disaster recovery plan for handling the loss of its information systems. GRISD's disaster recovery plan includes emergency contacts for the Technology Department staff, the district, and software and hardware vendors. The plan is complete with protocols for both partial and complete recoveries to ensure that the technology staff is knowledgeable in every aspect of recovery and restoration. The plan outlines designated alternate sites dependent upon the type of outage that occurs. The plan also includes system redundancy and fault protection protocols, as well as a tape backup plan.

VISD should develop a disaster recovery plan modeled on the one used by GRISD to ensure that it

EXHIBIT 3-3

KEY ELEMENTS OF A DISASTER RECOVERY PLAN

Build the disaster recovery team.	Identify a disaster recovery team that includes key policy makers, building management, end-users, key outside contractors and technical staff.
Obtain and/or approximate key information.	Develop an exhaustive list of critical activities performed within the district. Develop an estimate of the minimum space and equipment necessary for restoring essential operations. Develop a time frame for starting initial operations after a security incident. Develop a list of key personnel and their responsibilities.
Perform and/or delegate key duties.	Develop an inventory of all computer technology assets, including data, software, hardware, documentation and supplies. Set up a reciprocal agreement with comparable organizations to share equipment or lease backup equipment to allow the district to operate critical functions in the event of a disaster. Make plans to procure hardware, software and other equipment as necessary to ensure that critical operations are resumed as soon as possible. Establish procedures for obtaining off site backup records. Locate support resources that might be needed, such as equipment repair, trucking and cleaning companies. Arrange with priority delivery with vendors for emergency orders. Identify data recovery specialists and establish emergency agreements.
Specify details within the plan.	Identify individual roles and responsibilities by name and job title. Define actions to be taken in advance of an occurrence or undesirable event. Define actions to be taken at the onset of an undesirable event to limit damage, loss and compromised data integrity. Identify actions to be taken to restore critical functions. Define actions to be taken to re-establish normal operations.
Test the plan.	Test the plan frequently and completely. Analyze the results to improve the plan and identify further needs.
Deal with damage.	If a disaster occurs, document all costs and videotape the damage. Be prepared to overcome downtime on your own as insurance settlements take time to resolve.
Give consideration to other significant issues.	Do not make a plan unnecessarily complicated. Make one individual responsible for maintaining the plan, but have it structured so that others are authorized and prepared to implement it if needed. Update the plan regularly and whenever changes are made to your system.

SOURCE: National Center for Education Statistics, "Safeguarding Your Technology" (Modified by School Review).

does not lose important information during an emergency.

TECHNICAL POLICIES AND PROCEDURES (REC. 26)

The district lacks the standards, policies, and procedures needed to ensure its Technology functions operate effectively. As a result, the district has at least 17 different operating systems in place that technical staff is responsible for supporting, which is very costly. **Exhibit 3-4** lists the different computers and operating systems.

**EXHIBIT 3-4
VISD COMPUTERS AND OPERATING SYSTEMS
MAY 2004**

OPERATING SYSTEM	NUMBER OF COMPUTERS
Microsoft (MS) DOS	26
MS Windows 3.1	53
Windows 95	680
Windows 98	1,112
Windows ME	15
Windows NT Workstation	10
Windows NT Server	6
Windows 2000 Server	32
Windows 2000 Professional	481
Windows XP	652
Windows 2003 Server	25
Mac 6	34
Mac 7	308
Mac 8	214
Mac 9	488
Mac X	366
Other	11
Total	4,513

SOURCE: Victoria Independent School District, MIS Department, May 2004.

Technology standards ensure that software and hardware product purchases are compatible with an organization's current applications and plans for future technological improvements. They help guide

purchasers in choosing from the wide range of technology products and services available and ensure that the technology staff can maintain new purchases. In addition, standards can facilitate making bulk purchases and result in savings.

Without adequate software and hardware standards, policies, and procedures, the MIS Department is unable to prevent campuses and departments from ordering computers that are not compatible with existing systems and equipment. For example, the MIS Department orders all new computers with the Windows XP professional edition operating system because it supports the networking structure of the district. However, the district does not have any published software standards indicating that all new computers should be purchased with this operating system, and one of the district's departments ordered their new computers with a different operating system. Once the district realized the problem, they ordered the right operating system, requiring additional costs in both dollars and staff time.

In another example, three district elementary schools ordered computers with a one-year warranty even though the MIS Department recommends a three-year warranty because it allows the district to use the vendors' warranty resources to support the computer for three years. Although the warranty increases the price of the computer, the investment is justifiable when compared against the support costs associated with maintaining the computer over three years. However, district schools do not pay any support fees to the MIS Department for warranty work, making the lower priced one-year warranty more attractive to them. As a result, the MIS Department has to incur all the support expenses of these computers after the first year.

Exhibit 3-5 presents the district's MIS policies and describes their deficiencies.

**EXHIBIT 3-5
VISD TECHNOLOGY-RELATED POLICIES AND PROCEDURES
MAY 2004**

POLICY/PROCEDURE	ISSUE(S)
VISD does not have a purchasing policy that requires all technology purchases approved by the MIS Department.	Results in district spending its limited resources on orphan technologies that cannot be supported by the MIS Department and cannot be compatible with the district's existing technology infrastructure
VISD does not have hardware and software standards.	Results in inequity among schools and departments, and also creates support, training, and compatibility issues
VISD MIS Department does not have priority levels and expected response times for support services.	Results in unpredictable service response times and makes it difficult to measure support staff performance
VISD MIS Department does not have written back-up procedures for district servers that reside on campuses.	Results in inconsistent backup of the district's campus servers that may result in loss of instructional and administrative data

SOURCE: VISD MIS policies and procedures, April 2004; Gibson Consulting Group, Inc. analyses, May 2004.

San Antonio ISD (SAISD) provides written technology policies to ensure adherence by faculty, staff, and students. The scope of the policy documents covers all aspects of technology in the district. The policies are clear, informative, and user-friendly, and the documents are available on the district's website.

SAISD also distributes the established technology standards to district personnel likely to be involved in technology purchases. These standards help the district receive the best value for their dollar while ensuring that all technology purchases are compatible with the district network. The standards include minimum system configurations, software recommendations, and warranty suggestions.

Develop and distribute clearly defined and well-documented standards, policies, and procedures to set the framework for more efficient and effective technology purchases.

For background information on Computers and Technology, see p. 191 in the General Information section of the appendices.

FISCAL IMPACT

RECOMMENDATION	2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
CHAPTER 3. COMPUTERS AND TECHNOLOGY							
23. Improve the student-to-computer ratio to meet state recommendations and implement a replacement plan for older computers	\$0	(\$1,544,950)	(\$1,544,950)	(\$1,544,950)	(\$1,544,950)	(\$6,179,800)	\$0
24. Hire two additional technical support staff.	(\$40,259)	(\$60,388)	(\$60,388)	(\$60,388)	(\$60,388)	(\$281,811)	\$0
25. Develop, implement, and annually test a disaster recovery plan.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
26. Develop and document all technology policies, procedures and standards.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Totals-Chapter 3	(\$40,259)	(\$1,605,338)	(\$1,605,338)	(\$1,605,338)	(\$1,605,338)	(\$6,461,611)	\$0

CHAPTER 4

HUMAN RESOURCES MANAGEMENT

Personnel costs are typically the single largest expenditure of any school district, accounting for the majority of a district's operating expenditures. VISD's payroll costs are 86.7 percent of the district's annual budget. As a result, efficient and effective management of personnel functions is critical to the overall effectiveness of a district. Effective personnel management requires compliance with Equal Employment Opportunity statutes and other federal and state laws and establishment of fair and workable policies, procedures, and training programs. Personnel management includes staffing analysis, recruiting, hiring, salary and benefit administration, and performance evaluation.

The VISD Personnel Department processes the district's administrative, professional, and paraprofessional staff, and the various departments process classified personnel, including bus drivers, maintenance workers, custodians, and food service workers. Employee benefits are administered by the Payroll Department.

In 2003-04, the district employed 2,124 employees: 45.7 percent teachers, 2.5 percent campus administration, 0.9 percent central administration, 13.5 percent educational aides, 8.0 percent professional support, and 29.5 percent auxiliary.

ACCOMPLISHMENTS

- VISD established programs to attract students and paraprofessionals to the teaching profession.
- VISD's mentoring program provides an ongoing support system for new teachers.

FINDINGS

- VISD does not offer competitive salaries, making it difficult for the district to attract and retain high quality staff.
- VISD does not use staffing formulas for non-instructional positions and is overstaffed in clerical positions.
- VISD has a weak and decentralized human resources function making it difficult for the district to meet its personnel needs.
- VISD lacks a formal plan for filling positions caused by impending retirements and staff turnover.
- VISD lacks standards to ensure that proper employee documentation is consistently maintained.

- VISD's handwritten log of all expected teacher and administrator vacancies does not provide an effective budgeting tool.
- VISD's employee evaluation process is not integrated with its staff development function, making it difficult to design staff development based on teacher needs.
- VISD's generic evaluation instrument for non-instructional staff lacks performance standards.
- The VISD Personnel Department's web page is not well organized.

RECOMMENDATIONS

- **Recommendation 27 (p. 49): Phase in salary adjustments for all categories of staff in order to effectively recruit and retain highly qualified staff, and annually evaluate district salaries against peer districts.** Salary increases are difficult to afford and maintain since they represent recurring expenditures that must be funded every year. However, VISD is at risk of not being able to recruit quality staff to replace experienced staff choosing to leave the district. The district should raise the salaries to the average currently paid by the peer districts within five years. Additionally, the district should strive to be competitive by annually comparing its compensation plan to its peer districts and making adjustments as appropriate.
- **Recommendation 28 (p. 52): Adopt staffing standards for non-instructional staff.** By implementing the Southern Association of Colleges and Schools staffing standards for campus clerical staff, VISD should eliminate 37.5 positions. The district should analyze all non-instructional duties to identify what processes can be changed to increase staff efficiency and develop non-instructional staffing standards based on the results.
- **Recommendation 29 (p. 52): Establish a formal Human Resources function to better serve the needs of all VISD employees.** The district should fill the vacant director of Personnel position with someone who can change and lead a comprehensive Human Resources Department that will be responsible for administrative, professional, paraprofessional, and classified employees. Employee Benefits should be moved from the Finance Department to the Human Resources Management Department.

- **Recommendation 30 (p. 54): Develop a forecasting tool to identify areas where the district is vulnerable to losing experienced staff and implement a succession plan to ensure the district is prepared to fill the positions with well-qualified staff.** The director of Personnel should be responsible for identifying employees eligible to retire within three years and, based on employee plans, make plans for how the district will fill vacancies. Employee recruitment efforts should be expanded to include these positions.
- **Recommendation 31 (p. 55): Centralize all personnel records, establish records management procedures, and ensure controlled access.** VISD should keep all personnel records in the central office. These records should be kept secure and a formal process should be established restricting access to these files. The Personnel department also should standardize procedures regarding the information to be kept in each file.
- **Recommendation 32 (p. 56): Implement the position control module in the district's financial management software to provide more accurate staffing information for budgeting purposes.** The director of Personnel, in conjunction with the MIS department, should determine how to implement the position control module. The necessary data elements should be identified and the appropriate data dictionaries set up to facilitate this process. The Personnel Department should be responsible for collecting and updating data on a timely basis.
- **Recommendation 33 (p. 56): Integrate staff development with the performance appraisal and program evaluation systems to better coordinate staff development with teacher and student needs.** The director of School Improvement, who manages the VISD professional and staff development program, should work closely with the directors of Personnel and Testing/Program Evaluation to help ensure that staff development is based on district needs. This team should also work with the director of Information Technology to develop an electronic system that would track staff development needs and staff participation in training.
- **Recommendation 34 (p. 56): Add department-specific performance measures to the non-instructional staff evaluation instrument.** VISD should revise the evaluation tool it uses for non-instructional staff to include

objective performance measures. Each department would determine its own performance standards and set benchmarks. In addition to departmental measures, the evaluation tool should include overall performance measures related to the achievement of district goals and objectives.

- **Recommendation 35 (p. 57): Redesign VISD's Personnel Department website to make it easier to navigate and expand the content to provide more information.** The web site should be easy to navigate and provide links to information on the application process, district benefits, and departmental staff.

DETAILED ACCOMPLISHMENTS

TEACHER RECRUITMENT

VISD has implemented two programs to encourage high school students and paraprofessionals to become teachers. The Bridging the Education Scene for Teachers of Tomorrow (BESTT) is a course that familiarizes high school seniors with the expectations and rewards of teaching. Steps to Success helps VISD paraprofessionals earn a teaching certificate by providing assistance with childcare, TASP tutoring and fee waiver, computer equipment, and tuition assistance. Employees are eligible for assistance as long as they remain employed by the district. Three employees have completed the program and now teach in VISD.

MENTORING PROGRAM

VISD has a well-conceived mentoring program for new teachers. Its purpose is to promote the personal and professional well-being of beginning teachers, improve teaching performance, increase student achievement, increase teacher retention, and provide overall support to new teachers.

The Personnel Department, director of Testing and Evaluation, and school principals identify and match new teachers with experienced ones. VISD pays mentors a \$150 stipend per semester and mentor trainers a \$250 stipend. Mentors attend training in topics including the role of mentor, support for the mentee, team building, and coaching. Both mentor and mentee attend at least four district staff development sessions together. The district covers substitute pay for one day per semester each to enable the mentor and mentee to observe each other, attend additional staff development, or otherwise collaborate on improving teaching skills. Mentors and mentees meet at least once weekly and the program concludes with an evaluation and celebration. In 2003–04, a \$25,000 budget covered program costs for 35 mentors and mentees.

DETAILED FINDINGS

COMPENSATION (REC. 27)

VISD does not offer competitive salaries, making it difficult for the district to attract and retain high quality staff. While the board has increased employee salaries every year since 1995, most VISD employees remain far below the state and regional averages. Teacher pay is lower than the state average for similar school districts and its peer districts at every level of experience. As shown in **Exhibit 4-1**, VISD teacher salaries in 2003–04 (base pay plus stipends) are below the averages of its peer districts at every level of experience and can be summarized as follows:

- Beginning teachers earned 6.3 percent less than the peer average;
- Teachers with 1 to 5 years of experience earned 7.9 percent less than the peer average;
- Teachers with 6 to 10 years of experience earned 6.8 percent less than the peer average;
- Teachers with 11 to 20 years of experience earned 5.1 percent less than the peer average; and
- Teachers with 20 or more years of experience earned 7.5 percent less than the peer average.

The same situation exists in teacher pay across programs when comparing VISD to its peers. **Exhibit 4-2** presents this comparison showing that in 2003-04, with the exception of bilingual, English as a second language, and compensatory education programs, VISD was far below the peer average in terms of teacher pay by program area.

Central administrators, campus administrators, educational aides, professional support staff, and auxiliary staff are all paid below the average of the district’s peers. **Exhibit 4-3** compares the 2003–04 average salaries of all VISD staff categories to its peer group. The average salaries for every staffing category are summarized as follows:

- The superintendent earned 9.0 percent less than the peer average;

- Assistant superintendents earned 0.4 percent less than the peer average;
- Central administrators, excluding superintendents and assistant superintendents, earned 5.7 percent less than the peer average;
- Campus administrators earned 12.0 percent less than the peer average;
- Teachers earned 3.0 percent less than the peer average;
- Educational aides earned 12.0 percent less than the peer average;
- Professional support staff earned 6.6 percent less than the peer average; and
- Auxiliary staff earned 3.8 percent less than the peer average.

On August 26, 2004, the board approved a substantial pay increase for all staff categories. However, the superintendent’s salary has not been modified, as this requires a separate action by the board. Although the increase will bring the district closer to its peer group, it still remains below the average in most categories. With respect to non-teaching positions, the district remains below the peer average with the exception of the assistant superintendents and auxiliary personnel, who are slightly above the average. The result of the new salary increases as compared to the 2003-04 peer averages is summarized as follows:

- The superintendent still earns 9.0 percent less than the peer average;
- Assistant superintendents earn 3.4 percent above the peer average;
- Central administrators earn 1.0 percent less than the peer average;
- Campus administrators earn 2.9 percent less than the peer average;
- Educational aides earn 3.4 percent less than the peer average;
- Professional support staff earns 1.7 percent less than the peer average; and
- Auxiliary staff earns 3.0 percent above the peer average.

**EXHIBIT 4-1
AVERAGE TEACHER SALARIES BASED ON YEARS OF EXPERIENCE
VISD VERSUS PEER DISTRICTS
2003-04**

YEARS EXPERIENCE	BRYAN	LAMAR CISD	TYLER	VICTORIA	WICHITA FALLS	PEER AVERAGE**
Beginning	31,720	37,198	32,949	\$31,332*	\$31,884	\$33,438
1 to 5	34,229	38,423	34,730	32,418	33,488	\$35,215
6 to 10	35,350	40,963	36,430	34,745	36,412	\$37,289
11 to 20	41,178	45,664	43,094	40,813	42,001	\$42,984
20 & Over	47,709	54,734	50,196	46,868	50,021	\$50,665
Average Salary	\$37,904	\$43,680	\$40,539	\$39,003	\$39,903	\$40,349

SOURCE: Texas Education Agency, PEIMS, 2003–04.
 *Includes stipends, beginning base pay for VISD beginning teachers was \$30,500.
 **The peer average excludes Victoria

**EXHIBIT 4-2
AVERAGE TEACHER SALARY BY PROGRAM AREA
VISD VERSUS PEER DISTRICTS
2003-04**

PROGRAM AREA	BRYAN	LAMAR CISD	TYLER	VICTORIA	WICHITA FALLS	PEER AVERAGE
Regular Education	\$39,875	\$44,879	\$42,191	\$39,492	\$40,931	\$41,969
Bilingual	35,357	38,987	35,401	37,689	35,553	36,325
Compensatory Education	38,876	44,358	39,335	40,866	40,764	40,833
Gifted & Talented	35,991	43,666	41,399	38,385	46,495	41,888
Vocational Education	41,076	47,437	40,321	40,608	44,211	43,261
Special Education	38,885	43,246	41,660	39,408	40,659	41,113
English as Second Language	38,991	42,947	37,228	41,456	38,145	39,328
Adult Education	35,356	38,453	N/A	25,432	N/A	36,905
Honors Program	38,515	43,139	38,468	38,569	39,150	39,818
Migrant Education	N/A	N/A	N/A	N/A	32,899	N/A

SOURCE: Texas Education Agency, PEIMS 2003-04.

**EXHIBIT 4-3
COMPARISON OF AVERAGE SALARIES
VISD VERSUS PEER DISTRICTS
2003-04**

STAFF CATEGORY	BRYAN	LAMAR CISD	TYLER	VICTORIA	WICHITA FALLS	PEER AVERAGE
Superintendent	\$153,216	\$157,590	\$167,671	\$142,000	\$146,000	\$156,119
Assistant Superintendents	\$89,524	N/A	\$95,000	\$92,446	\$94,000	\$92,841
Central Administration	\$64,887	\$79,518	\$73,032	\$69,013	\$75,409	\$73,212
Campus Administration	\$60,373	\$66,393	\$61,309	\$54,087	\$57,805	\$61,470
Teachers *	\$36,787	\$42,168	\$39,231	\$37,832	\$37,824	\$39,003
Educational Aides	\$13,621	\$14,312	\$14,715	\$12,317	\$13,336	\$13,996
Professional Support	\$43,038	\$48,481	\$45,800	\$42,804	\$45,932	\$45,813
Auxiliary	\$15,827	\$18,932	\$18,764	\$17,002	\$17,154	\$17,669

SOURCE: Texas Education Agency, 2003-2004 Staff Salaries and FTE Counts, Totals by District, 2003-04.

* Teacher averages vary from those reported in other because these numbers are corrected from the original PEIMS submission.

Teachers remain below the 2003-04 peer average at every level of experience and can be summarized as follows:

- Beginning teachers earn 4.8 percent below the peer average;
- Teachers with 1 to 5 years of experience earn 4.4 percent less than the peer average;
- Teachers with 6 to 10 years of experience earn 2.8 percent less than the peer average;
- Teachers with 11 to 20 years of experience earn 0.5 percent less than the peer average; and
- Teachers with 20 or more years of experience earn 4.9 percent less than the peer average.

Exhibit 4-4 summarizes the approved increase by staff category.

**EXHIBIT 4-4
APPROVED SALARY INCREASES
2004-05 BUDGET**

STAFF CATEGORY	INCREASE
Administrators	5% Midpoint of salary
Teachers	\$1,000 plus step increase (2.4%-6.9%)
Classified & Paraprofessionals	Greater of 5% Midpoint or \$1,200

SOURCE: VISD, Chief Financial Officer, August 27, 2004.

To attract and retain qualified employees, a district must offer competitive salaries and benefits. Fort Worth ISD's Compensation Plan is designed to stay competitive with appropriate labor markets; reflect the levels of skill, effort, and responsibility required of different jobs; reward continued length of service; be fiscally controlled and cost effective; comply with all federal, state, and local laws and Board of Education policies; and encourage outstanding individual and team performance.

VISD should phase in salary adjustments to bring all categories of VISD employees up to the 2003-04 peer average by 2008-09 and should annually evaluate district salaries against peer districts. With the exception of the assistant superintendents and the auxiliary staff, every employee group remains

below the peer average. It is assumed that the district will phase in additional salary adjustments beginning in 2005–06 and continue over the subsequent three years. The annual percent increase in salary is based on the total variance between the VISD compensation level and the average compensation level of the peer districts, with equal increases each year until VISD reaches the 2003–04 peer average. Therefore, the fiscal impact associated with implementing this recommendation has been calculated as follows:

NON-TEACHING STAFF

- The superintendent receives a 1.8 percent increase each year beginning in 2004–05 until the compensation adjustment in 2008–09 is 9.0 percent higher than the base compensation paid in 2003–04.
- Central administrators, excluding the superintendent and assistant superintendents, receive an additional 0.25 percent increase beginning in 2005–06 until the compensation adjustment in the fifth year is 1.0 percent higher than the base compensation paid in 2004–05.
- Campus administrators receive an additional 0.725 percent increase beginning in 2005–06 until the compensation adjustment in the fifth year is 2.9 percent higher than the base compensation paid in 2004–05.
- Educational aides receive an additional 0.85 percent increase beginning in 2005–06 until the compensation adjustment in the fifth year is 3.4 percent higher than the base compensation paid in 2004–05.
- Professional support receives an additional 0.45 percent increase beginning in 2005–06 until the compensation adjustment in the fifth year is 1.7 percent higher than the base compensation paid in 2004–05.
- Auxiliary staff is above the peer average in salary and will not receive a wage increase.

It will cost the district \$874,383 (\$2,556 + \$88,716 + \$174,877 + \$261,037 + \$347,197) over the next five years to bring salaries of non-teaching staff up to the

2003–04 peer average. **Exhibit 4–5** presents the incremental cost to the district each year.

TEACHERS

The salary adjustment for teachers was calculated based on the number of years of experience as compared to the peer districts. More than half of VISD’s teachers have more than 10 years of teaching experience, making the fiscal impact of increasing teacher pay significant.

- Beginning teachers receive an additional 1.26 percent increase beginning in 2005–06 until the compensation adjustment in the fifth year is 4.8 percent higher than the base compensation paid in 2004–05.
- Teachers with between 1 and 5 years experience receive an additional 1.1 percent increase beginning in 2005–06 until the compensation adjustment in the fifth year is 4.4 percent higher than the base compensation paid in 2004–05.
- Teachers with between 6 to 10 years experience receive an additional 0.7 percent increase beginning in 2005–06 until the compensation adjustment in the fifth year is 2.8 percent higher than the base compensation paid in 2004–05.
- Teachers with between 11 to 20 years experience receive an additional 0.125 percent increase beginning in 2005–06 until the compensation adjustment in the fifth year is 0.5 percent higher than the base compensation paid in 2004–05.
- Teachers with more than 20 years experience receive an additional 1.225 percent increase beginning in 2005–06 until the compensation adjustment in the fifth year is 4.9 percent higher than the base compensation paid in 2004–05.

It will cost the district \$3,179,032 (\$317,903 + \$635,806 + \$953,709 + \$1,271,614) over the next five years to bring teacher salaries up to the 2003–04 peer average. **Exhibit 4–6** presents the incremental cost to the district each year.

The five–year fiscal impact for implementing this recommendation is \$4,053,415 (\$874,383 + \$3,179,032). This fiscal impact does not consider any

**EXHIBIT 4–5
INCREMENTAL FISCAL IMPACT OF NON-TEACHING SALARY ADJUSTMENTS**

STAFFING CATEGORY	STAFF COUNTS	2004–05 APPROVED TOTAL SALARY	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
Superintendent	1.0	\$142,000*	\$2,556	\$5,112	\$7,668	\$10,224	\$12,780
Assistant Superintendents	3.0	\$277,338	\$0	\$0	\$0	\$0	\$0
Central Administration	7.9	\$545,203	\$0	\$1,363	\$2,726	\$4,089	\$5,452
Campus Administration	49.0	\$2,650,263	\$0	\$19,214	\$38,429	\$57,643	\$76,858
Professional Support	181.0	\$7,747,096	\$0	\$32,925	\$65,850	\$98,775	\$131,701
Education Aides	287.5	\$3,541,384	\$0	\$30,102	\$60,204	\$90,305	\$120,407
Auxiliary	626.0	\$10,643,252	\$0	\$0	\$0	\$0	\$0
Total	1,155.4	\$25,546,536	\$2,556	\$88,716	\$174,877	\$261,037	\$347,197

SOURCE: Gibson Consulting Group, Inc, May 2004, and Texas Education Agency, 2003-04 Staff Salaries and FTE Counts, Totals by District, 2003–04.

*Fiscal impact assumes the board does not approve a pay increase for the superintendent in current 2004–05 budget.

**EXHIBIT 4-6
INCREMENTAL FISCAL IMPACT OF TEACHING SALARY ADJUSTMENTS**

YEARS EXPERIENCE	STAFF COUNTS	2004-05 APPROVED TOTAL SALARY	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
Beginning	49.9	\$41,588,417	\$0	\$19,061	\$38,122	\$57,183	\$76,244
1 to 5	223.3	\$7,519,810	\$0	\$82,718	\$165,436	\$248,154	\$330,872
6 to 10	171.2	\$6,204,309	\$0	\$43,430	\$86,860	\$130,290	\$173,721
11 to 20	255.9	\$10,941,183	\$0	\$13,676	\$27,353	\$41,029	\$54,706
20 & Over	269.4	\$12,981,037	\$0	\$159,018	\$318,035	\$477,053	\$636,071
Total	969.7	\$39,234,735	\$0	\$317,903	\$635,806	\$953,709	\$1,271,614

SOURCE: Gibson Consulting Group, Inc, May 2004, and Texas Education Agency, 2003-04 Staff Salaries and FTE Counts, Totals by District, 2003-04.

subsequent increases in the average peer salary.

STAFFING FORMULAS (REC. 28)

VISD does not use staffing formulas for non-instructional positions and compared to the Southern Association of Colleges and Schools (SACS) standards is overstaffed in the number of clerks.

Based on research and best practices in effective schools SACS developed standards presenting a common core of expectations to help districts develop and maintain quality schools. Exhibits 4-7, 4-8, and 4-9 present the SACS accreditation standards for campus clerical positions in elementary, middle, and high schools, respectively.

**EXHIBIT 4-7
SACS ACCREDITATION STANDARDS FOR CAMPUS CLERICAL STAFF ELEMENTARY SCHOOLS**

ENROLLMENT	SECRETARY/CLERKS
1-263	0.5
264-439	1.0
440-659	1.0
660-879	1.5
880-1,099	1.5
1,100-1,319	2.0
1,320-up	2.0

SOURCE: Southern Association of Colleges and Schools Checklist of Standards for the Accreditation of Elementary Schools, 2001-02.

**EXHIBIT 4-8
SACS ACCREDITATION STANDARDS FOR CAMPUS CLERICAL STAFF MIDDLE SCHOOLS**

ENROLLMENT	SECRETARY/CLERKS
1-249	0.5
250-499	1.0
500-749	1.5
750-999	1.5
1,000-249	2.0
1,250-499	2.0
1,500-up	2.0

SOURCE: Southern Association of Colleges and Schools Checklist of Standards for the Accreditation of Elementary Schools, 2001-02.

Exhibit 4-10 compares VISD's non-federally funded

**EXHIBIT 4-9
SACS ACCREDITATION STANDARDS FOR CAMPUS CLERICAL STAFF HIGH SCHOOLS**

ENROLLMENT	SECRETARY/CLERKS
1-249	1.0
250-499	2.0
500-749	3.0
750-999	3.5
1,000-1,249	4.0
1,250-1,499	4.5
1,500-up	4.5

SOURCE: Southern Association of Colleges and Schools Checklist of Standards for the Accreditation of High Schools, 2001-02.

clerical staffing counts to SACS staffing standards. As this chart shows, VISD high schools are overstaffed by 15 positions. VISD middle schools are overstaffed by 9 positions, and the elementary schools are over staffed by 13.5 positions.

VISD should adopt staffing standards for non-instructional staff. The district will reduce the number of campus clerical staff by 37.5 positions and save \$738,289 annually. At the high school level, the district will save \$297,906 ($[\$16,693 \text{ average salary} \times 1.028 \text{ variable benefit rate}] + \$2,700 \text{ fixed benefit rate} \times 15 \text{ positions}$). It will save \$180,011 at the middle school level ($[\$16,830 \text{ average salary} \times 1.028 \text{ variable benefit rate}] + \$2,700 \text{ fixed benefit rate} \times 9 \text{ positions}$). At the elementary level, the district saves \$260,372 ($[\$16,135 \times 1.028] + \$2,700 \text{ fixed benefit rate} \times 13.5 \text{ positions}$). Assuming that these savings will begin in January 2005, the district will save \$492,193 in the first year ($\$738,289 / 12 \text{ months} \times 8 \text{ months}$).

HUMAN RESOURCE FUNCTIONS (REC. 29)

The district does not have a clearly defined Human Resources (HR) function, instead distributing traditional HR functions among several departments. The Personnel Department processes professional and paraprofessional staff, while individual departments process classified employees. Plant

Maintenance is responsible for risk management, and the Payroll Department manages employee benefits.

The VISD Personnel Department performs most of these functions for administrators and professional

**EXHIBIT 4-10
VISD NON-FEDERALLY FUNDED CAMPUS STAFF COUNTS VERSUS SACS STANDARDS
2004**

CAMPUS	ENROLLMENT	CAMPUS CLERICAL STAFF		
		VISD	SACS	OVER (UNDER)
Memorial High - Senior	1,614	12.0	4.5	7.5
Memorial High - Stroman	2,667	12.0	4.5	7.5
Total	4,281	24.0	9.0	15.0
Elementary				
Crain Middle	1,011	5.0	2.0	3.0
Howell Middle	1,066	5.0	2.0	3.0
Patti Welder Middle	1,056	5.0	2.0	3.0
Total	3,133	15.0	6.0	9.0
Elementary				
Aloe Elementary	553	2.0	1.0	1.0
Chandler Elementary	591	2.0	1.0	1.0
Dudley Elementary	521	2.0	1.0	1.0
FW Gross Elementary	499	2.0	1.0	1.0
Guadalupe Elementary	123	1.0	0.5	0.5
Hopkins Elementary	458	2.0	1.0	1.0
Juan Linn Elementary	457	2.0	1.0	1.0
DeLeon Elementary	606	2.0	1.0	1.0
Mission Valley Elementary	209	1.0	0.5	0.5
O'Connor Elementary	583	2.0	1.0	1.0
Rowland Elementary	497	2.0	1.0	1.0
Shields Elementary	646	2.0	1.0	1.0
Smith Elementary	519	2.0	1.0	1.0
Vickers Elementary	564	2.0	1.0	1.0
William Wood Elementary	120	1.0	0.5	0.5
Total	6,946	27.0	13.5	13.5
Grand Total	14,360	66.0	28.5	37.5

SOURCE: Staffing standards established by the Southern Association of Colleges and Schools, 2000 and 2002; VISD staffing counts by location, VISD Business Office, April 2004.

A human resource department is generally responsible for the following:

- recruiting employees;
- overseeing the interviewing, selection, and processing of new employees;
- retaining employees;
- processing promotions, transfers, and resignations;
- determining and maintaining compensation schedules;
- planning and forecasting personnel needs;
- maintaining complete employee records;
- developing and maintaining job descriptions;
- managing the employee evaluation process;
- handling employee complaints and grievances;
- developing personnel policies; and
- ensuring that related laws and regulations are followed.

and paraprofessional staff, but provides very limited oversight, if any, to the department heads that manage classified personnel. The only support the Personnel Department gives Child Nutrition, Plant Maintenance, and Transportation is to conduct criminal background checks. As a result, there are inconsistencies in how Human Resource management is conducted throughout the district.

The Payroll office administers all benefits, and conducts new employee orientation. The payroll supervisor is responsible for managing all aspects of the district's employee benefit program, with the assistance of a third-party administrator.

The current HR structure may impede VISD's ability to effectively resolve the human resource related challenges it currently faces. These challenges include: complying with the No Child Left Behind

(NCLB) standard that states all teachers must be “highly qualified” within the next year (11 district teachers are on an emergency permit); recruiting teachers in light of a national teacher shortage and the district’s low salary schedule; replacing recent retirees; managing the escalating costs of employee benefits; and remaining in compliance with any federal and state labor laws. These challenges will be difficult to address without consistent processes and procedures in place.

A critical factor for success of the Human Resources Department is strong leadership. A strong HR director typically has a minimum of five years experience managing human resource functions in a school system and a degree in human resources, personnel administration, or industrial and labor relations. The position is an upper level management position that reports directly to the superintendent. A strong leader can develop a clear vision, motivate others to share that vision, and help staff work toward achieving it.

Exhibit 4-11 presents the proposed reorganization structure of the department.

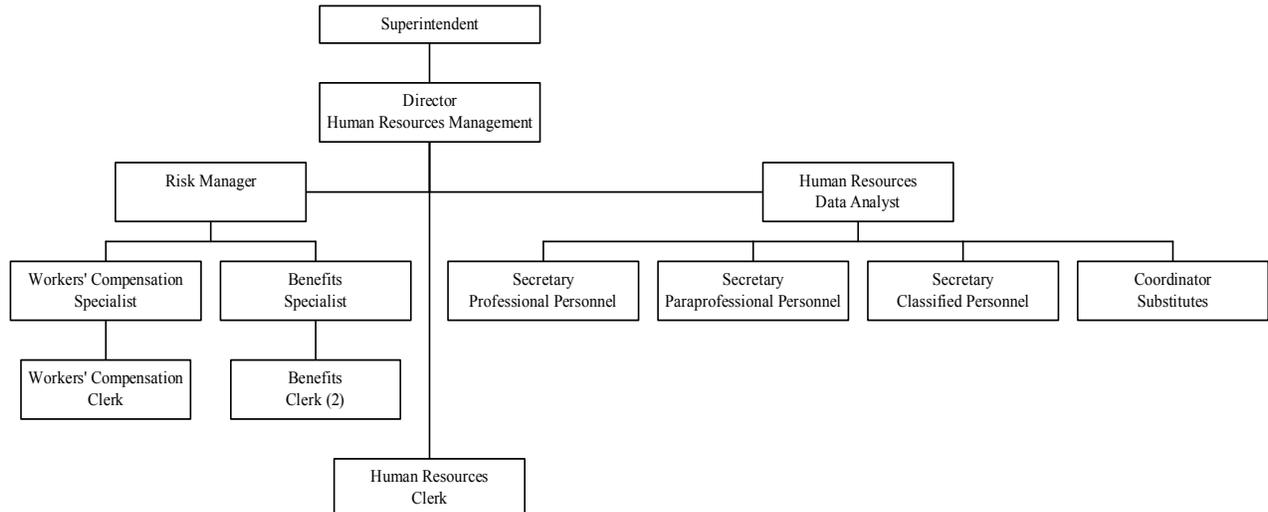
VISD should establish a formal centralize its Human Resource function under one director and move Employee Benefits from the Finance Department to Human Resources (HR). The Payroll personnel that currently administer the district’s benefit programs should be transferred to Human Resources Department, with the exception of the Payroll supervisor. Risk Management also should be placed in HR. The risk manager should oversee all benefits,

including health insurance, workers’ compensation, and the property and casualty insurance needs of the district. The district should hire an employee Benefits specialist to assume the benefits duties currently performed by the Payroll supervisor and a paraprofessional to process classified staff.

The director of Personnel position is currently vacant and should be replaced at an equal salary to compensate the new director for an expanded role. (The previous director was making a high salary due to a long tenure with the district.) The position of Benefits specialist will cost the district \$35,928 annually ([$\$32,323$ base salary \times 1.028 in variable benefits] + \$2,700 health insurance). The salary is based on the salary paid by McAllen ISD for the same job duties. The position of secretary – Classified Personnel will cost the district \$25,601 annually ([$\$22,277$ base salary \times 1.028 in variable benefits] + \$2,700 health insurance). The annual cost for training Human Resource Department staff is estimated at \$300, based on a training of trainer model. Many human resource workshops, especially those offered by Region 3, can be attended for less; however, the average cost per workshop provided by a national training firm is \$300.

In 2004-05, this reorganization would cost the district a total of \$41,319 [$(\$35,928$ for the Benefits Specialist salary divided by 12 months \times 8 months) + $(\$25,601$ for the secretary – Classified Personnel salary divided by 12 months \times 8 months) + \$300 for training, assuming the two positions would be filled in January 2005)]. The annual cost in subsequent

**EXHIBIT 4-11
HUMAN RESOURCES MANAGEMENT DEPARTMENT
PROPOSED ORGANIZATION STRUCTURE**



SOURCE: Gibson Consulting Group, Inc, May 2004.

years would be \$61,829 (\$35,928 + \$25,601 + \$300).

SUCCESSION PLAN (REC. 30)

VISD lacks a formal plan for filling positions caused by impending retirements and staff turnover. In 2003–04, VISD projected that it would lose 100 teachers, 15 administrators, 20 paraprofessionals, 20 food service staff, and 20 maintenance personnel through resignations or retirement. More than 54 percent of VISD’s teaching staff has in excess of 11 years of experience, and 28 percent have 20 or more years of experience. Only 28.2 percent of the district’s teachers have less than five years experience. Although teacher turnover rates have increased from 10.1 percent in 1997–98 to 11.8 percent in 2001–02, the district does not use trend analysis to forecast future retirements or relocations. **Exhibit 4-12** compares teacher experience at VISD to its peers. The district is well below the peer average for beginning teachers and above the peer average for the number of teachers that have in excess of 20 years teaching experience.

Many organizations use succession planning as a standard part of managing financial and human resources. Succession planning is a systematic process whereby professional and personal development is blended with an organization’s strategic plan to ensure that the organization is prepared to fill any position that becomes vacant with a qualified person. It allows an organization to anticipate vacancies and prepare competent replacements, or have adequate time to recruit an appropriate candidate for the position.

VISD should develop a forecasting tool and use succession planning to adequately prepare for impending retirements. The director of Personnel should be responsible for identifying employees eligible to retire within three years and make plans for how the district will fill vacancies with well-qualified staff. Employee recruitment efforts should be expanded to include these potential vacancies.

EMPLOYEE FILES (REC. 31)

VISD lacks standards to ensure that proper

employee documentation is consistently maintained. It currently maintains its personnel files in several different locations with no system in place to ensure that all files are kept in compliance with state and federal regulations. The Paraprofessional Personnel Services secretary maintains the personnel files for paraprofessional staff, while the Personnel data analyst maintains the files for the district’s administrators and teachers. The substitute coordinator is responsible for substitute’s records. Records for classified employees are kept in their respective departments.

The organization of the files differs by department, and with the exception of staff in the Personnel Department, the custodians of the files have not had any training to ensure the files are compliant with current federal and state requirements. Proper records maintenance is critical to protecting the rights of staff and reducing the district’s liability in the event of an employee dispute. Title VII of the Civil Rights Act of 1964 and the Americans with Disabilities Act (ADA) requires all employers subject to those statutes to “make and keep such records relevant to the determination of whether unlawful practices have been or are being committed.”

Exhibit 4-13 summarizes the types of personnel data that must be retained by the district.

Effective Human Resource departments keep records in individual files that are always locked in a central area with controlled access. Most personnel records should be kept together in a personnel file; however, certain types of documents should be kept separately. A comprehensive and efficient records management process can aid in recruitment, retention, training, promotion, compensation, quality, and cost control and can be the best defense for any potential legal issues that might arise.

VISD should centralize all personnel records, ensure controlled access, and establish records management procedures for maintaining personnel files. The files should be organized consistently with separate sections for applications; transcripts and service records; contracts and letters of assurance; and

**EXHIBIT 4-12
TEACHER EXPERIENCE
VISD VERSUS PEER DISTRICTS
2003–04**

YEARS EXPERIENCE	BRYAN	LAMAR CISD	TYLER	VICTORIA	WICHITA FALLS	PEER AVERAGE
Beginning	75.2	64.2	83.1	49.9	48.1	67.7
1 to 5	326.6	370.0	354.0	223.3	294.4	336.3
6 to 10	181.7	242.6	216.2	171.2	207.6	212.0
11 to 20	202.1	250.2	312.1	255.9	335.8	275.1
20 & Over	149.7	228.3	287.7	269.4	226.8	223.1
Total Teachers	935.3	1155.3	1253.1	969.7	1112.7	1,114.2

SOURCE: Texas Education Agency, PEIMS, 2003–04.

performance appraisals to reduce the time it takes to find a document. The one-time cost of hiring someone to help with this process is estimated at \$1,200 (\$7.50 per hour x 80 hours x 2 temporary workers).

The Personnel Department is responsible for performance appraisals; School Improvement manages professional development; and Curriculum and Instruction attends to student data and program evaluation. Professional development is based on

**EXHIBIT 4-13
REQUIRED PERSONNEL RECORDS**

PERSONNEL DATA	PERSONNEL FILE	SEPARATE FILE
Job applications, resumes, or other job inquiries	X	
Employee wage records, name, address, age, sex, job title, time and day workweek begins, pay rate.	X	
Employee wage records such as time cards, wage rate tables, and wage differentials between workers		X
Employee personnel files (job evaluations, tests, training, promotions, disciplinary notices, demotions, discharges, and layoffs)	X	
Employment eligibility records or I-9 Forms		X
Workers' compensation records		X

SOURCE: *Personnel Practices*, Volume 1, No. 2, August 1997.

INEFFECTIVE POSITION CONTROL (REC. 32)

VISD's position control process is manual, not regularly updated, and does not provide the district with an effective budgeting tool. The director of Personnel maintains a handwritten log of all expected teacher and administrator vacancies. When a position becomes vacant, the file in the position control database is updated. Because the position control database must be manually updated, the information is not current. The district's financial system has a position control module, but the district has not implemented it. This module provides the district with an inventory of the authorized positions by job class. It records the position records and tracks salaries paid versus budgeted for each position. The system also tracks the number of positions authorized versus the number of positions filled. The module supports the budget process by presenting various staffing scenarios so that the district can effectively plan its optimal staffing levels.

VISD should use the position control feature on its financial system. In order to accurately budget payroll expenditures, the position control information must be accurate and up-to-date. Payroll makes up 86.7 percent of the district's annual budget.

EVALUATION AND STAFF DEVELOPMENT (REC. 33)

VISD's employee evaluation process is not integrated with its staff development function, making it difficult to design staff development based on teacher needs.

information received from disaggregated test scores as well as input from campus leadership, Curriculum and Instruction, and other departments.

School principals conduct teacher performance appraisals and record areas in need of improvement directly on the appraisal form. They forward appraisal forms to the Personnel Department for filing. The process does not allow for the Staff Development director to develop a staff development program based on assessment information and trend data.

To ensure that staff development is based on the identified needs of staff and students, the district should implement a process to coordinate its staff development, personnel appraisal, and program/student evaluation systems. The director of School Improvement, who manages the VISD professional and staff development program, should work closely with the directors of Personnel and Testing/Program Evaluation to help ensure that staff development is based on district needs. This team should also work with the director of Information Technology to develop an electronic system that would track staff development needs and staff participation in training.

EMPLOYEE EVALUATION (REC. 34)

The district uses a generic evaluation instrument for non-instructional staff that mirrors the duties outlined in the job description, but does not provide measurable standards. Without measurable standards, an employee does not have a clear understanding of what constitutes an acceptable level of performance. It also allows for supervisors to make subjective determinations of performance,

which can be difficult to defend in the event of litigation.

A performance standard identifies specific criteria for measuring job performance. While a job description describes the tasks to be performed, a performance standard defines how well each function or task must be performed in order for the employee to meet or exceed expectations. Measurable performance standards ensure that supervisors and employees understand job expectations; provide a basis for ongoing feedback and performance counseling; and serve as the foundation for the formal performance appraisal.

There are a number of approaches to developing written performance standards. One is the directive approach in which supervisors write standards with input from human resources. A better method is a collaborative approach in which supervisors work with employees to develop performance standards for their positions. The second method helps ensure that the performance standards are appropriate to the job requirements, reflect the realities of the work context and conditions, and are equally understood and accepted by employees and supervisors.

Effective performance standards describe performance expectations in terms of timeliness, cost, and quality; specify the acceptable margin for error; and specify conditions under which the performance is to be accomplished or assessed. Good performance standards are realistic, specific, measurable, and consistent with the district's goals.

VISD should revise the evaluation tool it uses for non-instructional staff to include department specific and objective performance measures. Each department would determine its own performance standards and set benchmarks. In addition to departmental measures, the evaluation tool should include overall performance measures related to the achievement of district goals and objectives.

HUMAN RESOURCES ONLINE (REC. 35)

VISD's online Personnel web page is not well-organized. Policies are listed alphabetically, by "regulation topic," which is not user-friendly or intuitive. The list is relatively long and requires that a user scroll through the entire list for the title of a document rather than a general subject. For example, information for vendor salesmen is listed under three different topics: "Access to School Personnel by Sales Persons"; "Sales, Vendors, and Purchases"; and

"Vendors on Campus." In another case, information about paraprofessionals as substitutes is listed alphabetically under "Use of Paraprofessionals as Substitutes," rather than within a more general category like "Substitutes" or "Teachers."

Laredo ISD's Human Resources Departmental web site is easy to navigate and provides a great deal of information about the department and its role in the district. The navigation toolbar contains the following links:

- Current Vacancies;
- On-line Application;
- Download Employment Application;
- Mission, Goals, Objectives;
- Employee Benefits;
- Frequently Asked Questions;
- Human Resources Staff;
- Procedures Manual & Forms (HR Staff Only);
- Recruitment Video (low bandwidth);
- Career Fair Schedule;
- Local Information Booths;
- Teacher Pay Plan;
- Administrative Pay Plan; and
- Professional Pay Plan.

The web page also contains links to district incentives and a section titled "Human Resources News Update." This section contains the following updates.

- TRS-HRAccount Information;
- Reasons Why you Should Join LISD 2004-2005;
- Employee Assistance Program (EAP) Services;
- GED to Ph.D. News for Paraprofessionals;
- GED to Ph.D. News for Teachers; and
- No Child Left Behind Bulletin.

VISD's Personnel Department should redesign its website so it is easier to use. A user-friendly, informative website is an inexpensive way to promote a department while providing service to the department's existing and potential customers.

For background information on Human Resource Management, see p. 193 in the General Information section of the appendices.

FISCAL IMPACT

RECOMMENDATION		2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
CHAPTER 4: HUMAN RESOURCE MANAGEMENT								
27.	Phase in salary adjustments for all categories of staff in order to effectively recruit and retain highly qualified staff, and annually evaluate district salaries against peer districts.	(\$2,556)	(\$406,619)	(\$810,683)	(\$1,214,746)	(\$1,618,811)	(\$4,053,415)	\$0
28.	Adopt staffing standards for non-instructional staff.	\$492,193	\$738,289	\$738,289	\$738,289	\$738,289	\$3,445,349	\$0
29.	Establish a formal Human Resources function to better serve the needs of all VISD employees.	(\$41,319)	(\$61,829)	(\$61,829)	(\$61,829)	(\$61,829)	(\$288,635)	\$0
30.	Develop a forecasting tool to identify areas where the district is vulnerable to losing experienced staff and implement a succession plan to ensure the district is prepared to fill the positions with well-qualified staff.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
31.	Centralize all personnel records, establish records management standard procedures and ensure controlled access.	\$0	\$0	\$0	\$0	\$0	\$0	(\$1,200)
32.	Implement the position control module in the district's financial management software to provide more accurate staffing information for budgeting purposes.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
33.	Integrate staff development with the performance appraisal and program evaluation systems to better coordinate staff development with teacher and student needs.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
34.	Add department-specific performance measures to the non-instructional staff evaluation instrument.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
35.	Redesign VISD's Personnel Department website to make it easier to navigate and expand the content to provide more information.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Totals-Chapter 4		\$448,318	\$269,841	(\$134,223)	(\$538,286)	(\$942,351)	(\$896,701)	(\$1,200)

CHAPTER 5

FACILITIES CONSTRUCTION, USE, AND MANAGEMENT

Effective facilities management ensures that a district has adequate facilities designed and built to enhance a district's primary educational programs; comply with state, local, and federal regulations; and minimize utility and maintenance costs. Efficient facilities are essential to building public trust and confidence in district management.

Victoria Independent School District's (VISD's) facilities are located on 478 acres with a total of 25 campuses, including 15 elementary schools, three middle schools, one high school with two campuses, and five special purpose schools. The district also maintains seven support facilities, for an approximate total of two million gross square feet (GSF) of space. The replacement value of VISD's facilities is estimated at \$200 million.

The Plant Maintenance department employs 231 individuals: 81 maintenance and 150 custodial. The district's current organization is unique in that the director also oversees the Purchasing department and the district's risk manager.

FINDINGS

- Consolidation of the district's high schools into one school with two campuses resulted in overcrowding at one campus and underutilization of the other. The Stroman campus is at 95.5 percent capacity while the Senior campus is at 50.4 percent capacity. Ideal utilization rates at secondary schools are between 70 and 85 percent.
- VISD has not completed a comprehensive adjustment of school attendance zones, resulting in the underutilization of many of its schools.
- VISD lacks a method to monitor the number and usage of portable classrooms as a component of overall facility utilization. As a result, several VISD elementary schools have a disproportionately high number of portable classrooms.
- VISD does not maintain long-term enrollment projections either district-wide or on a school-by-school basis.
- VISD's facilities assessment process is incomplete, resulting in understated facility maintenance, repairs, and renovation needs. Furthermore, the facility assessments are not summarized; multiple documentation processes and an ineffective compilation method cause missed and redundant entries. The district's process for assessing facilities is inadequate to

assess current functional adequacy or to perform cost analysis.

- VISD does not have a comprehensive facilities master plan that can be directly translated into immediate, mid-term, and long-term maintenance, renovation, and construction projects.
- District staff does not provide the Facilities committee and school trustees with adequate information to make sound decisions regarding facilities.
- The Plant Maintenance Department does not have comprehensive written facilities construction, management, and use procedures.
- VISD does not have an adequate system for preventive maintenance that focuses on increasing the performance and extending the useful life of facilities and equipment.
- VISD uses a computerized maintenance management system (CMMS), but work order requests are submitted either by hard-copy form, electronic mail, or by phone, delaying receipt of work order requests.
- VISD lacks a well-defined maintenance staffing standard or formula. As a result, VISD's maintenance staffing levels exceed established standards by more than eight percent, which creates unnecessary costs to the district.
- VISD does not have a comprehensive construction management process and lacks well-developed construction-related standards.
- VISD is overstaffed in custodial operations and the district does not fully adhere to their own internal staffing formulas. VISD's staffing formula does not match industry standards, and the scheduling of workers is inefficient.
- VISD's cleaning equipment is outdated and affects work quality and staff productivity.
- The district does not regularly perform cost-benefit analysis to determine if certain services should be performed by VISD personnel or contracted to the private sector.
- VISD does not employ the tools or techniques necessary to perform ongoing energy management.
- VISD does not hold personnel accountable for energy use and does not proactively provide

energy management education to personnel whose actions most directly affect energy usage.

- VISD's Plant Maintenance Department organizational structure is not logically aligned to promote efficient and effective facilities planning, design, and construction functions.

RECOMMENDATIONS

- **Recommendation 36 (p. 62): Develop a short-term plan to alleviate the overcrowding at the Stroman High School Campus.** VISD must take action to alleviate the recognized overcrowding problem at Stroman in order to improve the existing traffic flow problems. Three options exist to provide a short-term solution. First, construct an additional stairwell to ease the traffic flow of students moving between classes. Second, convert Stroman into a ninth grade center and transfer tenth graders to the Senior campus. Third, place more portable buildings on the Stroman campus.
- **Recommendation: 37 (p. 63): Close three of the district's elementary schools and adjust the attendance zones to achieve an optimum efficiency factor rate of 90 to 95 percent in the remaining 12 elementary schools.** The district must first examine the attendance zones and utilization rates of all elementary schools to determine which schools should be closed. In addition to performing the attendance zone study, the district needs to evaluate the condition of each school as well as locations as they relate to student demographics. Closing three schools would increase space utilization, reduce maintenance and custodial requirements, cut utility expenses, and eliminate salaries and benefits for non-instructional positions.
- **Recommendation 38 (p. 65): Monitor the usage of portables on an ongoing basis and substantially reduce the use of portable classrooms at the elementary schools.** The district should dispose of 24 of the 29 portable classrooms located at the elementary schools, moving the remaining five portables to the Stroman high school campus.
- **Recommendation 39 (p. 66): Develop five-year enrollment projections for all schools by grade level, and update the enrollment projections annually.** The district should hire an outside consultant to perform the enrollment projections. The Plant Maintenance Department should work with the consultant to develop five-year enrollment projections by grade and by school and update these projections annually.

The projections should include student data as well as growth data and residential construction trends from the county and city.

- **Recommendation 40 (p. 67): Conduct a comprehensive facilities assessment that provides VISD with detailed information regarding the condition of school and administrative facilities.** The facilities assessment should not use a scoring method, but rather a detailed inventory of maintenance and improvement requirements by facility and specific location within the facility or campus.
- **Recommendation 41 (p. 70): Prepare a long-range facilities master plan.** VISD should conduct a comprehensive facilities analysis and incorporate the results into a master plan. The plan should include specific recommendations for each existing and proposed facility, identification of deferred maintenance, documented cost estimates, and a timeline to address these recommendations. In addition, the district should develop a long-range plan to address the Stroman campus overcrowding.
- **Recommendation 42 (p. 72): Develop a comprehensive and consistent facilities reporting mechanism and report to the Facilities committee at least four times per year.** The Plant Maintenance and Purchasing Director should develop a standard format for delivering facilities information to the committee. One meeting should focus on setting priorities for the upcoming budget cycle for the maintenance and capital improvement programs.
- **Recommendation 43 (p. 73): Develop and implement facilities management policies and procedures.** A comprehensive district-wide Plant Maintenance procedures manual should help department staff understand their role and what the district expects of them. At a minimum, the manual should include planning, design, and construction management procedures; maintenance management procedures; and custodial services procedures. The district's vision, philosophy, operating procedures, and general practices should be institutionalized within the manual.
- **Recommendation 44 (p. 74): Develop a preventive maintenance plan to help reduce maintenance costs.** The director of Plant Maintenance and Purchasing should develop a preventive maintenance program, tied to the existing computerized work order management system, which identifies all preventive

maintenance projects needed in the district, provides a detailed schedule by facility, and prioritizes needs.

- **Recommendation 45 (p. 75): Upgrade the district's automated process for assignment and tracking of maintenance work orders.** The Plant Maintenance Department should use more capabilities of the existing Computerized Maintenance Management System (CMMS) to effectively track work orders and better manage operations. For instance, the web-based work order request feature would eliminate at least two steps in the process by allowing end users to initiate the request using any Internet browser within the intranet.
- **Recommendation 46 (p. 77): Develop staffing formulas and reduce maintenance staffing.** The district should develop staffing formulas for its maintenance workers based on objective industry standards, such as those developed by the Association of Physical Plant Administrators (APPA) on peer comparison analysis and identified district needs. The departmental work processes, job descriptions and educational credentials, management tools, and accountability should be studied in-depth to realign processes with a customer feedback program.
- **Recommendation 47 (p. 78): Develop formal construction management standards in order to monitor future construction and renovation projects.** VISD should develop the following standards: format and procedure for project definition; methodology for determining in-house versus contracted projects; educational specifications; computer-aided design (CAD) standards; construction estimate and budget format and protocols; construction specifications; construction schedule format and protocols; project close-out procedures; project evaluation process; and proactive warranty claim processes.
- **Recommendation 48 (p. 79): Revise custodial staffing formulas and develop more efficient work schedules with more work done after school.** The district should develop staffing formulas based upon industry standards and use those formulas to immediately reduce staff. In addition, the custodial supervisor and head custodians should develop more efficient work schedules with more cleaning after school. The practice of requiring custodians to monitor the halls and restrooms should be discontinued.
- **Recommendation 49 (p. 82): Develop a janitorial equipment replacement plan and purchase only industrial quality equipment.** VISD should properly equip janitorial staff for increased efficiency. It is standard for custodians to be assigned individual vacuums and for each school to be provided one or more floor buffers. The janitorial equipment upgrade and replacement plan should include procedures to assess the operability of the custodial equipment. The plan should also include a phased-equipment replacement schedule that keeps annual costs manageable.
- **Recommendation 50 (p. 82): Establish a methodology for the cost-benefit analysis of contracted services, and perform analysis of maintenance and construction activities to determine which, if any, services should be contracted to the private sector.** The director of Plant Maintenance and Purchasing and the chief financial officer should lead the effort to establish analysis methodology.
- **Recommendation 51 (p. 83): Implement software upgrades and internal procedures to support continuing energy management analysis.** The director of Plant Maintenance and Purchasing, or superintendent if necessary, should prioritize the upgrade of software, conversion of data from the current software, and the one-time labor necessary to catch up on the input of energy bills. When the new system is in place and all data entered, the director of Plant Maintenance and Purchasing should prepare an energy usage report covering the past five years to identify where VISD is performing well and where opportunities exist for cost reduction.
- **Recommendation 52 (p. 84): Establish energy consumption accountability at the school level and require periodic energy usage education.** The director of Plant Maintenance and Purchasing and the Energy manager should establish the content and format of a periodic energy consumption report. The report should include performance indicators for peer facilities so that individual locations can identify how they are performing against like facilities. On an annual or biannual basis, the energy manager should visit each location to review historic energy usage with personnel, facilitate usage reduction methods appropriate for the particular location, and provide personnel with an update of district-wide energy conservation measures.

- **Recommendation 53 (p. 84): Reorganize the Plant Maintenance Department to ensure that all aspects of a comprehensive facilities operation, including the facilities planning, design, and construction management functions, are properly assigned and being performed.** The director of Plant Maintenance and Purchasing and Plant Maintenance coordinators, with the assistance of the Human Resources Department, should research other school districts’ facility departments to identify an organizational structure that will work for VISD’s environment. The organizational structure implemented by the district should ensure that it covers all the necessary functional areas.

DETAILED FINDINGS

STROMAN OVERCROWDING (REC. 36)

The consolidation of the district’s two high schools into one school with two campuses and a lack of long-term plans and projections for enrollment and facility utilization has resulted in under or over utilization at almost all campuses. Memorial High School is overcrowded at the Stroman Campus with 95.5 percent capacity and underutilized at the Senior campus with 50.4 percent capacity. The Stroman Campus houses all students in grades 9 and 10, while the Senior Campus houses all students in grades 11 and 12.

The optimum efficiency factor rate used for secondary schools ranges from 70 to 85 percent as compared to the 90 to 95 percent efficiency factor applied to elementary schools. The types of classroom needs vary significantly in secondary schools, causing the efficiency factor to be reduced. Secondary school students are more mobile with traffic flow between each class period. It is possible that some instructional space will not be utilized every period due to specialized classroom needs. For example, classes such as science courses with a laboratory component, special programs, and

extracurricular activities may not meet during every class period during the school day. Many of these classes are offered only at the secondary level.

In addition to exceeding capacity, the Stroman building’s configuration also contributes to the problem. The building was built in 1967. The main structure is four stories. The first two stories have four stairwells, while the third and fourth stories only have two stairwells. The review team observed students during class changes at the end of the school day. The hallways and stairwells are overly congested. The school administration has taken all reasonable measures to help the situation, including designating stairwells as “Up Only” and “Down Only” as well as closely supervising the areas during class changes. District staff informed the review team that the Victoria Fire Department has inspected the Stroman campus and has not issued a citation for overcrowding. **Exhibit 5-1** identifies some of the capacity and safety related concerns contained in the teacher, parent, and student survey responses.

The overcrowding at the Stroman campus has contributed to disciplinary incidents among its ninth and tenth graders.

VISD should develop a short-term plan to alleviate the overcrowding at the Stroman campus. During the on-site visit, many suggestions were provided to resolve the recognized overcrowding at the Stroman campus. These suggestions ranged from constructing a ninth grade center to building a third high school campus. All of the suggestions have very broad financial and social implications and therefore should be carefully and methodically addressed through the strategic and facilities planning efforts. In the interim, VISD must take action to alleviate the recognized overcrowding problem at Stroman in order to improve the existing traffic flow problems. The three options for alleviating the Stroman campus overcrowding are presented below.

Construct an additional stairwell to ease the traffic flow of students moving between classes. Constructing an

EXHIBIT 5-1

COMMENTS FROM SURVEY RESPONSES

PARENTS’ SURVEYS
▪ The Stroman Campus is too crowded.
▪ Stroman Campus is overcrowded. The school was not built to handle the number of students currently attending.
▪ Stroman is dangerously overcrowded and it is not clean.
▪ I am concerned about the crowding I hear of at the high school Stroman campus.
TEACHER COMMENTS
▪ My greatest concerns are at the high school level. Students are falling behind and the environment is not conducive to learning.
▪ The freshman, sophomore campus is extremely crowded. There are not enough desks for all students.
▪ I am concerned about our 9-10 grade Stroman campus. It’s overcrowded and there are problems with behavior on this campus.
STUDENTS
▪ The halls are too crowded. The stairs are so crowded that by the time you get to the floor you need to be on, you don’t have enough time to go to the restroom.

SOURCE: Texas School Performance Review, VISD Survey Responses, April 2004.

additional stairwell would provide better traffic flow and reduce the amount of time it takes students to move from class to class. However, given that this would be a temporary solution to the problem, the cost of the construction and the amount of disruption to the campus during the construction do not make this an attractive option. The construction would only intensify the overcrowding problem as it would necessitate a portion of the campus be closed to ensure the safety of students and staff. In addition, the district would have to pay for a feasibility analysis by an architect and engineer to ensure the structural integrity of the building is maintained.

Convert Stroman into a ninth grade center and transfer tenth graders to the Senior campus. Converting Stroman into a ninth grade center is a step that should be taken only after careful consideration and is not a good short-term solution. This decision will impact students, faculty, staff, and the community. The initial consolidation of the high schools was not well received and it would be a critical mistake to take major action without community support and before conducting thorough planning. This option would cause grade realignments on three different occasions in less than an eight-year span; the 2000–01 initial consolidation, this short-term solution, and the long-term solution that will probably occur in the next two to three years. This plan would require that the district add approximately five portables to the Senior campus. The capacity at Stroman ninth grade campus would drop to 49 percent, and Senior campus capacity would increase to 85 percent.

Place more portable buildings on the Stroman campus. The final option to place more portable buildings on the campus is the most viable short-term solution to the overcrowding problem at Stroman. This option would provide the most economical short-term solution. This option does not require any modifications to the school structure and would not require an architect. In order to address the specific problem of overcrowding on the upper floors of the main buildings, VISD should add enough portable buildings to bring the utilization of those classrooms down to a manageable level. The upper floors of the main building have 33 classrooms. In order to get proper student circulation/flow, only about 75 percent of these should be in use during any given period. Replacing the capacity that would be unused on the upper floor would require the addition of about 10 portable classrooms. The district has an excess of portable buildings that can be reallocated from other campuses. Five portables can be moved from the Senior campus with the remaining five being moved from the elementary schools. This option would bring the Stroman campus to the upper range of optimum capacity of 85 percent for

high schools. Finally, once the district has completed its long-term planning, conducted focus groups with the community, and secured the necessary funding to implement the plan, it will be relatively easy to remove the portables once they are no longer needed.

The fiscal impact analysis is based on the most economical of the three options - keep the tenth graders at Stroman and add 10 classroom portables to the campus. Adding space at Stroman will require moving five portable buildings currently at the Senior campus and five portables from the elementary schools. The relocation of the 10 portables will entail the construction of sidewalks and canopies, installation of electrical service, and integration into the school's fire alarm and communications systems. The cost to relocate the portables to the Stroman campus is estimated at \$5,000 for each building, or an estimated total cost of \$50,000.

UTILIZATION (CAPACITY) RATES OF SCHOOLS (REC. 37)

VISD has not completed a comprehensive adjustment of school attendance zones, resulting in the underutilization of many of its schools. All elementary schools are underutilized compared to optimum efficiency factors. Operating under capacity results in inefficient staffing and increased operations costs to the district.

Optimum efficiency factors are used to determine the physical capacity of schools. The optimum efficiency factor used for elementary schools is 90 to 95 percent. The optimum efficiency factor is applied to the total student stations available at the school, resulting in a capacity reflecting the maximum enrollment that administrators can assign and principals can plan around during standard operations.

The optimum efficiency factor is reduced from 100 percent to 90 to 95 percent to account for the space requirements necessary for the unique characteristics of the education program to be housed in specific classrooms, the number of students to be accommodated, and the characteristics of those students to be accommodated. For example, the space required for a science laboratory is much different than a traditional classroom.

Exhibit 5–2 shows total capacity including portables as well as the capacity of the district's permanent structures by school. As noted in **Exhibit 5–2**, the efficiency factors of VISD elementary schools range from 49.6 to 75.4 percent of total capacity, with an average of 63.8 percent. The exhibit also notes permanent capacity ranging from 56.2 percent to 86.4 percent, with an overall average of 67.5 percent.

**EXHIBIT 5-2
FACILITY USAGE PER STUDENT FOR VISD SCHOOLS
2003-04**

SCHOOLS	ENROLLMENT	PERMANENT CAPACITY	PORTABLE CAPACITY	TOTAL CAPACITY	PERCENTAGE OF STUDENT COUNT OF PERMANENT CAPACITY	PERCENTAGE OF STUDENT COUNT OF TOTAL CAPACITY
Elementary Schools						
Aloe Elementary	553	814		814	67.9%	67.9%
Chandler Elementary	591	814		814	72.6%	72.6%
DeLeon Elementary	606	858	44	902	70.6%	67.2%
Dudley Elementary	521	748		748	69.7%	69.7%
FW Gross Elementary	499	682		682	73.2%	73.2%
Guadalupe Elementary	123	176	22	198	69.9%	62.1%
Hopkins Elementary	458	792	44	836	57.8%	54.8%
Juan Linn Elementary	457	770	88	858	59.4%	53.3%
Mission Valley Elementary	209	242	110	352	86.4%	59.4%
O'Connor Elementary	583	814	154	968	71.6%	60.2%
Rowland Elementary	497	880		880	56.5%	56.5%
Shields Elementary	646	880	44	924	73.4%	69.9%
Smith Elementary	519	924		924	56.2%	56.2%
Vickers Elementary	564	748		748	75.4%	75.4%
William Wood Elementary	120	154	88	242	77.9%	49.6%
Total: Elementary Schools	6,946	10,296	594	10,890	67.5%	63.8%
Middle Schools						
Crain Middle School	1,011	1,050	250	1,300	96.3%	77.8%
Howell Middle School	1,066	1,400		1,400	76.1%	76.1%
Patti Welder Middle School	1,056	1,525	75	1,600	69.2%	66.0%
Total: Middle Schools	3,133	3,975	325	4,300	78.8%	72.9%
High Schools						
MHS – Stroman Campus	2,267	2,250	125	2,375	100.8%	95.5%
MHS – Senior Campus	1,614	3,050	150	3,200	52.9%	50.4%
Total: High Schools	3,881	5,300	275	5,575	73.2%	69.6%
All Schools						
Total: All Schools	13,960	19,571	1,194	20,765	71.3%	67.2%

SOURCE: VISD, Plant Maintenance Capacity Report, May 2004 and Texas Education Agency 2003-04 PEIMS.

NOTE: Elementary school capacities are based on 22 students per instruction space and secondary schools capacities are based on 25 students per instruction space.

With utilization at only 63.8 percent, VISD is unnecessarily spending money on heating and cooling, maintaining, insuring, and staffing underutilized space. In addition to teaching professionals, each school employs administrators and secretaries, its own crew of custodians, cafeteria managers, and kitchen staff, as well as a counselor and a librarian. **Exhibit 5-3** lists the average campus administrative and support staffing costs for elementary schools excluding teachers. Salary and benefits are based on the district's minimum salary or wage rates per position. School secretaries and kitchen staff are also staffed at each school; however, like teachers, the staffing ratios for these employees are based on enrollment or meals per labor hour. Therefore, these positions are not listed in this exhibit. The exhibit also shows the average campus 2003-04 budget expenses for VISD elementary school.

VISD should close three of the district's elementary schools and adjust the attendance zones to achieve an optimum efficiency factor rate of 90 to 95 percent in the remaining 12 elementary schools. The

**EXHIBIT 5-3
AVERAGE ELEMENTARY CAMPUS
EXPENDITURES
2003-04**

EXPENDITURE TYPE	AMOUNT
TOTAL SALARIES & WAGES	
Principal	\$59,935
Assistant Principal	44,948
Counselor	45,124
School Nurse	32,325
Library Aide	12,245
Cafeteria Managers	20,259
Head Custodian	20,447
Custodians (3)	38,658
Total Salaries	\$273,941
Contracted Services	13,466
Supplies and Materials	33,143
Other Costs	3,282
Total Operating Costs	\$49,891
Total Costs	\$323,832

SOURCE: VISD, Average of 2003-04 Campus Budgets for Smith Elementary and William Wood Elementary and the average salaries and wages for all elementary schools, 2003-04.

calculation methodology that indicates that three elementary schools could be eliminated is determined by multiplying the total permanent capacity of elementary schools of 10,296 by the 90 percent optimum efficiency factor to derive an optimum capacity of 9,266.4 students. Subtracting the current student population of 6,946 from 9,266.4, calculated as the total optimum capacity, produces an excess capacity of 2,320.4 students. The following formula is used to calculate the average optimum capacity by school: $[(10,296 \text{ total capacity} \times 90 \text{ percent optimum efficiency factor}) / 15 \text{ elementary schools} = 617.76]$. Dividing the calculated excess capacity number of 2,320.4 by the average optimum capacity per elementary school number of 617.8 produces a current capacity that exceeds the optimum capacity by 3.8 schools.

Closing three elementary schools would increase space utilization, reduce maintenance and custodial requirements, cut utility expenses, and eliminate salaries and benefits for non-instructional positions. Selling the schools and returning the property to the tax rolls would also produce savings, but because it is uncertain at this time which schools would be selected for closure, the savings cannot be determined. An alternative to selling the schools would be for the district to lease out space as offices to local government or private organizations and businesses. This alternative would provide long-term flexibility to VISD because the schools could be re-opened if future enrollments required additional facilities in the effected areas.

Because teaching staffing reductions are assumed elsewhere in this report, only the non-instructional staffing, utility, and maintenance expenses are

included as savings, as shown in **Exhibit 5-3**. The fiscal impact also assumes that the district will choose to sell the three schools rather than maintain the empty buildings. Based on these assumptions, the total annual savings for this fiscal impact is \$971,496 ($\$323,832 \times 3 \text{ schools}$). The savings could not begin until 2005-06.

PORTABLE CLASSROOMS (REC. 38)

VISD lacks a method to monitor the number and usage of portable classrooms as a component of overall facility utilization. As a result, several VISD elementary schools have a disproportionately high number of portable classrooms. The district currently has 51 portable instructional spaces district-wide, with 27 of these classroom portables at elementary schools. **Exhibit 5-4** shows the number of portable general-purpose classrooms as well as permanent general-purpose classrooms located at the elementary schools. As noted in **Exhibit 5-2**, VISD’s elementary schools are under capacity; therefore, portable use cannot be justified. In addition to the 27 instructional classrooms, 2 other portables are used for non-instructional purposes, for a total of 29 portable structures.

The director of Plant Maintenance and Purchasing stated principals are encouraged to utilize portable buildings for special purposes, such as counseling, in-school suspension, tutoring, and music. However, classroom teachers often prefer portable classrooms to classrooms in permanent buildings. Individual teacher preferences for portable classrooms are often the determining factor in room assignments. Magnet schools commonly use general-purpose classroom space for special purposes, such as science or

**EXHIBIT 5-4
NUMBER OF ELEMENTARY GENERAL PURPOSE PERMANENT CLASSROOMS AND PORTABLES
2003-04**

SCHOOLS	# OF PERMANENT GENERAL PURPOSE CLASSROOMS	# OF PORTABLE GENERAL PURPOSE CLASSROOMS	TOTAL # OF GENERAL PURPOSE CLASSROOMS
Aloe Elementary	37		37
Chandler Elementary	37		37
DeLeon Elementary	39	2	41
Dudley Elementary	34		34
FW Gross Elementary	31		31
Guadalupe Elementary	8	1	9
Hopkins Elementary	36	2	38
Juan Linn Elementary	35	4	39
Mission Valley Elementary	11	5	16
O'Connor Elementary	37	7	44
Rowland Elementary	40		40
Shields Elementary	40	2	42
Smith Elementary	42		42
Vickers Elementary	34		34
William Wood Elementary	7	4	11
Total Elementary	468	27	495

SOURCE: VISD, Plant Maintenance Department, May 2005.

technology instruction. Without aggressive enforcement of portable building use, the buildings tend to remain in use longer than is justified.

Portable classroom use varies widely throughout schools in the district. No inefficient use of portables is noted at the middle schools as all schools are just below or within the recommended utilization rates for secondary schools. The Senior Campus has five portables that are not necessary with an efficiency rate of 50.4 percent. The Stroman Campus with an efficiency rate of 95.5 percent needs additional portables to reduce the overcrowded conditions. The placement of additional portables at Stroman is discussed elsewhere in this chapter.

Temporary classrooms are a common feature of American schools, but they are usually erected to meet enrollment fluctuations or house temporary programs. Nationally, the average square footage of portable classrooms is 10 percent of the total gross square feet at the elementary level and 5 percent at the middle school and high school level. VISD has a district policy on the use, placement, or removal of portable classrooms that states, “the long term goal of the school district is to eliminate portable buildings in favor of permanent structures.”

The district should monitor and substantially reduce the use of portable classrooms at the elementary schools. For the initial effort, the director of Plant Maintenance and Purchasing should direct a concise room use analysis for the nine elementary schools that currently have portable buildings. The analysis needs to include a list of all rooms over 400 square feet with their current uses. All instructional spaces should list the teacher, subject, and grade and should be reconciled with the Human Resources Department. The list will identify any underutilized spaces and serve as a basis for migrating uses from portable buildings into permanent space. In some cases, building modifications may be required to make more efficient use of space. For instance, current programs involve more itinerant staff than expected at the time many of the schools were constructed. These itinerant staff use 200–400 square feet offices, yet sometimes are located in regular classrooms as large as 800 square feet. VISD may need to erect some simple partitions to create office space for these staff.

The district should dispose of 24 of the 29 portable classrooms located at the elementary schools, moving the remaining five portables to the Stroman High School campus. Disposition of the 24 portable classrooms on elementary school campuses could include demolishing, storing for future use or selling the portables, or donating the portable classrooms to the public. The most conservative fiscal analysis

approach is to assume that the district will donate the excess portable classrooms, with the receiving parties responsible for removal costs. The district would likely experience the same result if it tried to sell the portable classrooms because building removal costs may exceed expected revenues. According to one portable building construction company, the district should expect to pay approximately \$2,000 to demolish and haul off each building.

In calculating the fiscal impact of not having to operate the portables, the fiscal impact is based on VISD’s average cost of \$5.47 per square foot to operate facilities. However, this cost should be adjusted downward to reflect a conservative approach, as some of the cost is fixed and will not be avoided by the reduction of portables at the elementary schools only. Using half of the cost, \$2.74 per square foot, and applying it to the 768 square feet portables provides an annual savings of \$2,104 per portable. The disposal of the 24 portables will result in an annual savings of \$50,496 (24 x \$2,104). Savings will begin in 2005–06, as the changes are not likely to be implemented during the current 2004–05 school year.

ENROLLMENT PROJECTIONS (REC. 39)

VISD does not maintain current long-term enrollment projections either district-wide or on a school-by-school basis. The last enrollment projection study was performed in September 1997 by the Student Services Department. The 1997 report, labeled as a draft and never finalized, projected enrollment from 1997–98 through 2006–07. The projections showed an increase in all but two years, 2001–02 and 2002–03.

Since 1998–99, the district has seen enrollment decline from 15,059 students to 14,316 students, or 4.9 percent. Declines occurred in all but one year during this period. The district staff attributed this decline to the closing of businesses in the area and students transferring to private schools. **Exhibit 5–5** illustrates the district’s decline in enrollment with the percentage change for each year. The district does not develop and implement a reasonable method for estimating student enrollment for at least a five-year period, updated annually, to financially and operationally plan for facilities.

Typically, long-range plans use five-year enrollment projections based on the “cohort-survival method” because they tend to provide “middle of the road” projections. The “cohort-survival method” allows the district to develop average rates of student progression from kindergarten through twelfth grade, also known as the survival rate. These survival

EXHIBIT 5-5

VISD

**COMPARISON OF PROJECTED ENROLLMENT AND ACTUAL ENROLLMENT
1998-99 THROUGH 2003-04**

	1998-99	1999-2000	2000-01	2001-02	2002-03	2003-04
Projected Enrollment	15,173	15,196	15,047	15,006	15,182	15,328
Actual Enrollment	15,059	14,657	14,411	14,360	14,438	14,316
Difference	114	539	636	646	744	1012
Projected vs. Actual	(0.8%)	(3.5%)	(4.2%)	(4.3%)	(4.9%)	(6.6%)
% Change Actual	-	(2.7%)	(1.7%)	(0.4%)	0.5%	(0.8%)

SOURCE: VISD, Plant Maintenance Department enrollment projections, September 1997 and Texas Education Agency, PEIMS, 1998-99 through 2003-04.

rates are developed using the district's own historical data, and have proven to be accurate for other districts. Enrollment projections that are updated annually allow a district to recognize unforeseen population changes and shift resources such as staff and portable buildings to areas or schools that experience minor or temporary fluctuations in enrollment. Annual enrollment projections also help district management become aware of changing trends early enough to plan for permanent solutions.

The district should develop five-year enrollment projections for all schools by grade level and update the enrollment projections annually. The Plant Maintenance Department should work with a consultant to develop five-year enrollment projections by grade and by school and update these projections annually. The enrollment projections should include student socio-economic data as well as growth data and residential construction trends from the county and city. The annually updated enrollment projections should be evaluated against the projections used in the planning of the bond projects and the facilities master plan to ensure that the projects, when complete, will accurately respond to the student population. Additionally, these annual enrollment projections can be used in evaluating and adjusting attendance boundaries to help relieve overcrowding or excess capacity at individual schools.

The fiscal impact assumes that the district will hire a consultant to develop the five-year enrollment projection. The estimated cost for this service is \$34,000 for the first year, with updates estimated at \$24,000 in each year thereafter.

FACILITIES ASSESSMENTS (REC. 40)

VISD's facilities assessment process is incomplete, resulting in understated facility repairs and renovation needs. Furthermore, the assessments are not summarized; multiple documentation processes and an ineffective compilation method causes missed and redundant entries; and the methodology used does not provide necessary information to assess adequacy for function or to perform cost analysis. VISD has performed a facilities assessment on a one

to two year cycle, but the assessment process is not adequate to systematically maintain the value of facility assets.

First, the department does not perform a comprehensive cost analysis for each repair identified on the annual repair or maintenance inventory. Estimated costs are prepared only for items for which budget consideration is requested, with the remainder representing unquantified costs. Effective facility planning is jeopardized because the district fails to identify the total costs for all known repairs, thereby understating the cost estimates. Even though the assessments cover all facilities, the extent of the total repair/maintenance cost is unknown. Accordingly, the district is not able to compare total needs to available capital budget funds or determine whether bond programs will be required to bring the facilities up to standard. Additionally, facility repair versus significant upgrade or total replacement decisions are being made with incomplete information.

Second, maintenance assessment findings are not summarized. The facility assessment results are not concisely summarized to support the needs of district decision makers who must evaluate facility repair/upgrade requirements against competing requirements. The value of the annual inventory of required maintenance items that is being conducted is reduced because complete information on total needs does not make it into the budget consideration and long term planning processes.

Third, three distinct processes exist to document identified repairs: the Annual Assessment of Sites and Buildings; an automated work order system; and the approved and budgeted Facilities Project List, known locally as the "DragonSlayer" list. Although each of these processes fulfill a purpose, they are not consolidated into a master list that is then used to identify, budget, and track the completion of needed facility improvements.

The review team compiled and summarized the information from the assessment forms to analyze the data for comparison with the Facilities Project List and the work order system. The team noted

items identified as requiring repair on the assessment form that were not shown in the Facility Project List or in the district’s work order system. An example of the team’s analysis is shown below in **Exhibit 5–6**. The assessment forms identified 35 locations that still needed asbestos contaminated tile, floors, or walls replaced, whereas the Facilities Project List identified only seven. The team verified, by reviewing the work order system, that few of the repairs listed in the assessment have been completed as of April 2004. A review of maintenance requests documented on the work order system for an 11-month period beginning in February 2003 identified work order items that were not found on the assessment list.

The Plant Maintenance staff updates the Facility Project List each year before the budget process begins. During interviews, district employees advised the review team that the Plant Maintenance staff meets with principals and department heads to determine repair projects needed for their campus or facility in addition to the annual assessment. In reviewing the Facility Project List, the review team noted the following:

- Capital projects are mixed with preventive maintenance projects.
- Critical management information is missing, such as the date the project was identified, the project start and completion dates, and the estimated versus actual cost to complete the repairs; the term “various” is used to collectively denote that multiple campuses are involved without specifically identifying each campus in need of the repair; and, projects lack a risk-based ranking of priority.
- The methodology for selecting projects to go into the budgeting process is unclear.

- Items remain on the list for an excessive number of years.

Exhibit 5–7 presents an excerpt from the Facility Project List report.

Exhibit 5–8 identifies the number of years that specific projects from **Exhibit 5–7** have been on the list as of April 2004. In addition to the selected items shown in this exhibit, the review team noted that four items have been pending for six years, six items have been pending for five years, 17 items have been pending for four years, and 17 items have been pending for three years.

Fourth, the assessment approach used by VISD is considered a “scoring” system. A scoring system uses assessment criteria to place needs in one of several categories. In the case of VISD, these categories ranged from “Replacement” to “N/A,” in which the item does not exist at the school or facility. This assessment method does not provide information to determine the scope of remedial action required. For instance, noting that the ceiling tile requires “Repairs Only” does not describe the condition adequately to scope the magnitude or cost of the repair. Is this one ceiling tile or 50 ceiling tiles? Is this merely replacing ceiling tiles or does the grid also need replacement? Is the need for replacement caused by a more serious problem such as leaking pipes or roofing?

Finally, the assessment method does not include any assessment of adequacy. While the scoring assessment method does partially identify what is wrong with systems and equipment that exist, it does not address needed but missing systems or equipment. For instance, primary classrooms typically have sinks in them. If a classroom has a sink that is broken, the assessment method would capture that condition. However, if the classroom lacks a

**EXHIBIT 5–6
VISD PLANT MAINTENANCE DEPARTMENT
COMPARISON OF ASSESSMENT, FACILITIES PROJECT LIST AND WORK ORDER SYSTEM**

SCHOOL/DEPARTMENT	PER ANNUAL ASSESSMENT		PER APPROVED FACILITIES PROJECT LIST		PER WORK ORDER SYSTEM	
	NUMBER OF SITES	BUILDINGS	NUMBER OF SITES	LOCATIONS	NUMBER OF SITES	BUILDINGS
ASBESTOS						
Aloe Elementary	2	A, B	1	Kitchen		
Crain Middle School	5	A, B, C, F, I	3	Off, I, Art	2	All
DeLeon Elementary	3	A, C, D				
FW Gross Elementary	1	A				
Hopkins Elementary	1	A				
Juan Linn Elementary			1	Kitchen		
Plant Maintenance Department	1	A				
MHS – Senior	8	A, B, E, F, I, K, L, N	1	Field House	2	All
MHS – Stroman	6	B, C, D, E, F, I			1	All
Patti Welder Middle School	4	B, C, D, E				
Rowland Elementary	1	A				
Smith Elementary	2	A, B	1	B	1	B
Vickers Elementary	1	A			1	All
Total	35		7		8	

SOURCE: VISD, Plant Maintenance Department, April 2004.

**EXHIBIT 5-7
SELECTED ITEMS FROM THE FACILITY PROJECT LIST
2003-04**

FACILITY PROJECTS 2003-04 FISCAL YEAR (NOT IN PRIORITY ORDER)	
Special Projects	
Projects Description and Location	Amount
<ul style="list-style-type: none"> • Demolish William Offer School Building • Renovate Restrooms, Career Development School • Construct Metal Storage Building, Transportation Department • Install Sinks / Hot Water Heaters at Various Special Education Classrooms • Upgrade Landscaping/Install Sprinklers Systems, Various Campuses 	<ul style="list-style-type: none"> \$60,000 25,000 25,000 15,000 40,000
Maintenance Requirement	
Projects Description and Location	Amount
<ul style="list-style-type: none"> • Disabilities Act Compliance, Various Locations • Replace Floor Tile, Cafeteria, Aloe Elementary • Replace Exterior Doors, Bldg. B& C, Aloe Elementary • Paint Interior, Career Development Center • Replace Chalkboards and Marker Boards, Various Campuses 	<ul style="list-style-type: none"> \$25,000 5,500 7,500 28,000 5,000

SOURCE: VISD, Plant Maintenance Department, 2003-04.

**EXHIBIT 5-8
SELECTED ITEMS FROM THE FACILITY PROJECT LIST
NUMBER OF YEARS ON THE PROJECT LIST**

PROJECT	NUMBER OF YEARS
Paint Interior, Career Development Center	5
Renovate Restrooms, Career Development School	4
Disabilities Act Compliance, Various Locations	4
Replace Floor Tile, Cafeteria, Aloe Elementary	4
Replace Exterior Doors, Bldg. B& C, Aloe Elementary	4
Construct Metal Storage Building, Transportation Department	3
Replace Chalkboards and Marker Boards, Various Campuses	3
Install Sinks / Hot Water Heaters at Various Special Education Classrooms	2
Upgrade Landscaping/Install Sprinklers Systems, Various Campuses	2

SOURCE: VISD, Plant Maintenance Department, Facility Projects List 1998-99 through 2003-04.

sink entirely, the assessment method fails to capture and document the need to install a sink.

Several districts in Texas have assessment methods that yield a clear overall picture of maintenance requirements, including Houston, Dallas, El Paso, Beaumont, Galena Park, Fort Bend, Pasadena, and Tyler. In 2002, Houston ISD performed a room-by-room assessment of all facilities that were not part of the 1998 bond program. The assessment yielded a total need in excess of \$1 billion and formed the basis of the successful \$808 million bond referendum. The findings were published on the Internet, allowing interested parties an opportunity to evaluate the quality and comprehensiveness of the assessment.

Without a comprehensive understanding of facilities' condition, VISD cannot determine appropriate funding levels for the annual Capital Improvement Plan (CIP). This plan is typically budgeted from Maintenance and Operations funds and represents VISD's ongoing investment in facilities. Facilities are typically improved through a combination of bonds, grants, and capital improvement funds, all of which

VISD is currently using or has used in the past. Determining and planning for the appropriate combination of facility funding mechanisms is equally difficult, absent complete facility condition and cost assessments.

VISD should conduct a comprehensive facilities assessment that provides VISD with detailed information regarding the condition of school and administrative facilities. The facilities assessment should not use a scoring method, but rather a detailed description, estimated costs to remedy, and risk based priorities. The assessment effort should also include an analysis or a series of options for funding the necessary facility improvements. In particular, the level of annual capital improvement funds required by VISD facilities should be determined. The results of the assessment should be presented in a fashion that supports short- and long-term facility planning. The results should be used to make key decisions regarding prioritization of facility improvements. The assessment should also include an assessment of adequacy issues. While it is conceivable that VISD could do this with current personnel, the district should consider hiring an

outside firm to plan and conduct the initial assessment. If VISD hires an outside firm, the district should plan to have some personnel observe or participate in the assessment to prepare staff to replicate the assessment in subsequent years. The estimated cost for this recommendation is \$160,000.

FACILITIES ANALYSIS AND MASTER PLAN (REC. 41)

VISD does not have a comprehensive facilities master plan that can be directly translated into immediate, mid-term, and long-term projects. The absence of a district long-range planning function is preventing the district from meeting facility needs. Many of the district's permanent and portable facilities are in substandard condition and no formal plans exist to renovate or replace them. Further, educational needs for facilities are not defined. Finally, while the bond program provided facility improvements for many schools, none of the schools were completely renovated. The significant variances between the projects and anticipated funding shown in the 1997 Instructional Facilities Allotment (IFA) application and the actual spending at each campus, shown below in **Exhibit 5-9**, indicate that the individual studies were not integrated into a comprehensive plan or followed to completion.

VISD's most recent facilities planning effort was developed in 1996-97 and evolved into a seven-year, \$31 million bond program. While the effort included many components of a master plan, the pieces were never compiled into a plan to reflect the overall needs and priorities of VISD facilities. These studies have not been altered or updated to respond to changing conditions. The 1996-97 planning effort consisted of several discrete efforts that focused on the collection and listing of specific needs regarding existing facilities, such as:

- Enrollment projections prepared by former director of student services;
- Site improvement study, half of the facilities (by contracted engineer);
- Site improvement study, other half of the facilities (by contracted engineer);
- Physical plant study (by contracted architect);
- Mechanical, Electrical, and Plumbing (MEP) study, half of the facilities (by contracted engineer);
- MEP study, other half of the facilities (by contracted engineer)
- Citizens advisory committee, listing citizen-identified needs;

**EXHIBIT 5-9
1997 IFA APPLICATION VS. ACTUAL BOND SPENDING**

NAME	IFA APPLICATION	ACTUAL	REVISED DIFFERENCE
Mitchell Guidance Center	\$183,079	\$46,166	(75%)
Profit Academic Center	507,216	55,648	(89%)
Memorial HS - Senior Campus	4,647,002	5,104,171	10%
Memorial HS - Stroman Campus	4,444,525	3,596,066	(19%)
Crain Middle School	2,791,576	3,652,034	31%
Patti Welder Middle School	1,708,735	1,892,157	11%
Howell Middle School	1,963,610	2,156,524	10%
Aloe Elementary	939,009	506,727	(46%)
Dudley Elementary	1,055,683	261,222	(75%)
F.W. Gross Elementary	735,150	673,264	(8%)
Guadalupe Elementary	666,177	728,594	9%
Hopkins Elementary	1,467,003	521,834	(64%)
Juan Linn Elementary	1,239,972	620,534	(50%)
O'Connor Elementary	880,517	300,548	(66%)
Rowland Elementary	1,427,616	559,503	(61%)
Shields Elementary	1,145,889	1,238,485	8%
Smith Elementary	733,369	139,111	(81%)
Vickers Elementary	1,642,670	616,710	(62%)
William Wood Elementary	503,418	126,200	(75%)
Mission Valley Elementary	281,634	49,179	(83%)
DeLeon Elementary	372,944	248,230	(33%)
Chandler Elementary	0	76,614,910	100%
Patti Welder Stadium	95,100	57,627	(39%)
Stanly Elementary	1,336,137	0	(100%)
Transportation Office	65,000	33,903	(48%)
Memorial Stadium	0	115,253	100%
Career Development School	166,969	0	(100%)
Total	\$31,000,000	\$30,916,400	(0%)

SOURCE: VISD, Instructional Facilities Allotment Application dated 12/12/97, New Facilities and Major Renovations (1997 through July 2004).

- Food service study (by contracted specialist); and
- Facility walk-through study, compiled by former assistant superintendent and principals.

School districts use a number of planning processes and documents to build and maintain educational facilities that meet the changing needs of a community. A district's long-range facilities master plan is the result of these planning efforts and becomes the district's policy statement for allocating resources and developing alternatives for facility improvement. Facility master plans become increasingly important when enrollment changes quickly and/or facilities begin to age.

VISD does not have a dedicated facilities planning function. The district has a facilities committee that includes three school board members and district administrative staff including the director of Plant Maintenance and Purchasing and the superintendent. However, the committee's primary role and focus is on identifying and monitoring the status of current projects within the district.

The school board committee members interviewed by the review team stated that the facility committee usually meets every six months. They believe that the committee should meet more regularly, and the district staff needs to provide them with more information. They all acknowledge that the district needs a facilities plan. The committee members stated that the VISD 2000 Strategic Plan Goal 3.0 directs the district staff to develop a facilities master plan, but very little progress toward this goal has been made. Goal 3.0 of the Strategic Plan provides in part, "Campuses and facilities organized as centers of community collaboration and learning, efficiently meeting the student and community needs and expectations."

Committee members stated that they are concerned with overcrowding at the Stroman ninth and tenth grade campus. They stated that the district needs another high school and middle school in the near future; however, they did not provide the review team any information to indicate that they were basing their opinions on supporting data, such as enrollment projections or capacity analysis for each school. District staff recently provided the committee members a report on attendance zones. However, the information was in fact a report on new subdivisions that are under development, including maps of each development, along with the names of the schools that are likely to be impacted.

The Stroman campus overcrowding occurred partly because the decision to consolidate the high schools was made without the benefit of a facilities master

plan; and, absent a facilities master plan, the district was unable to anticipate the resultant Stroman overcrowding problem. Although the district held planning meetings prior to consolidating the two high schools, a review of the planning meeting minutes found that discussion about facilities was infrequent. The minutes for one meeting referenced overcrowding at Victoria High School and that the district needed to reduce the attendance at that school by 400 students and move them to Stroman High School. The current facts reflect that Victoria High School, now named Senior Campus, at 50.4 percent capacity is not over crowded, but Stroman Campus is excessively crowded at 95.5 percent capacity.

More recently, the district began to include facilities assessments in the strategic planning meetings. Minutes from these meetings mention determining facility needs and the cost of financing new facilities with bonds. The minutes go into detail about the cost per square foot – estimating cost of constructing a new high school for 1,600 students to be \$25 million to \$30 million plus land, for a total of \$35 million.

The "DragonSlayer" is the only report that is provided to the facilities committee. This report includes a Facility Project List that is updated annually. Projects are not prioritized, nor are target dates for project completion identified. The review team analyzed six years of data and noted that some projects have been on the list for five to six years. In addition, repairs to existing facilities are being made on an urgency and funds-availability basis. TEA recommends a facilities planning process model to assist districts in organizing and planning for facility growth (**Exhibit 5–10**). A planning process allows a variety of planning issues to be identified and addressed in the development of a master plan.

Medium- to large-sized districts regularly hire professionals to facilitate and develop all or parts of the facilities master plan. Outside professionals can provide districts with the ability to augment staff in areas where the district has limited staff resources and provide the district with skills not available within the district. Many districts use outside professionals for this purpose, including Beaumont, Corpus Christi, Dallas, El Paso, Fort Bend, Galena Park, Houston, and Pasadena ISDs.

The district should prepare a long-range facilities master plan. VISD should conduct a comprehensive facilities analysis and incorporate the results into the master plan. The plan should include specific recommendations for each existing and proposed facility, identification of deferred maintenance, documented cost estimates, and a timeline to address

**EXHIBIT 5-10
TEA RECOMMENDED FACILITIES PLANNING PROCESS**

PROGRAM ELEMENT	MISSION	RESPONSIBILITIES	DELIVERABLES
Planning	Needs Assessment	Identify current and future needs	Demographics, enrollment projections, facilities survey, boundary, funding, education program, market, staff capability, transportation analysis
	Scope	Outline required building areas, develop schedules and costs	Programming, cost estimating, scheduling, cost analysis
	Strategy	Identify structure	Facilities project list, master schedule, budget plan, organization plan, marketing plan
	Public Approval	Implement public relations campaign	Public and media relations
Approach	Management Plan	Detail roles, responsibilities, and procedures	Program management plan and systems
	Program Strategy	Review and refine details	Detailed delivery strategy
	Program Guidelines		Educational specifications, design guidelines, CAD standards

SOURCE: Texas Education Agency, Financial Accountability System Resource Guide (FASRG) Module: Facilities Management, 2004.

these recommendations. A comprehensive plan should also include the following:

- Accurate computer-aided drafting (CAD) plans of all facilities;
- Enrollment and school capacity projections;
- Design and construction standards and specifications;
- Life-cycle replacement projects for major building systems;
- A near-term and long-term implementation plan for Average Daily Attendance (ADA) and accessibility;
- An energy management plan;
- A plan to address potential mold and air quality concerns; and
- Requirements for safety, security, and information technology.

The district should also develop a long-range plan to address the overcrowding at Stroman campus.

Given the pressure and lack of facility planning experience of the existing facilities staff, the plan should be developed by an outside consultant. Development of the plan should be coordinated with all appropriate district departments and supervisors, including representatives for finance and budgeting, curriculum, facility users, maintenance, facilities, transportation, food services, and custodial operations. Community representatives should be included on the team developing the plan. The district should note that it is critical to perform a comprehensive facility condition assessment before the district contracts for the facilities master plan work.

Studies of this type range from \$0.05 to \$0.10 per gross square foot. VISD has some of the data already available, which should decrease some of the cost of

the study. Using a guideline at the middle of the range – \$0.07 per gross square foot – and a total area of 2.0 million gross square feet, the total one-time cost is approximately \$140,000.

FACILITIES REPORTS (REC. 42)

District staff does not provide the Facilities committee and school trustees with adequate information to make sound decisions regarding facilities. Information submitted to the committee and board members is not sufficient to provide a clear understanding of the district’s situation. Information is not displayed in a user-friendly format.

Since 1997, the Facilities committee has met approximately every six months. The committee receives what is called a “DragonSlayer” report. The report typically documents the current budget and schedule status in outline/bullet form. Some reports list proposed activities for discussion. That discussion is the primary method of prioritizing and identifying future projects. The reports do not include any comprehensive documentation of activities and do not include any reconciliation between actual schedules and costs and those developed in the planning phase. The majority of cost data is presented to the committee through tabulations on the meeting room whiteboards.

VISD’s Plant Maintenance and Purchasing director should oversee development of a comprehensive and consistent facilities reporting mechanism and report to the Facilities committee at least four times per year. Reporting on a frequent basis will keep the board informed and allow for long-range planning activities. While some information can be presented in abbreviated or bulleted fashion, each discrete project should include historic information as well as current status and show reconciliation between

budgets and total expected costs, and projected and actual completion dates. The meetings should occur at least once every quarter, and probably once every month during periods of elevated activity. One of these meetings, or a special meeting, should focus primarily on setting priorities for the upcoming budget cycle for the maintenance and capital improvement program.

MAINTENANCE MANAGEMENT POLICIES AND PROCEDURES (REC. 43)

The Plant Maintenance Department does not have comprehensive written facilities construction, maintenance, management, and use procedures. Although some maintenance procedures have been established for use of transportable facilities, preventive maintenance, and work order submission protocol, the district has no procedures developed for facilities planning, design, and construction management and custodial services.

The school board has adopted the following legal and local policies based on Texas Association of School Boards' Legal Policies and two specific, locally defined facility policies. **Exhibit 5-11** lists the board-adopted procedures, both legal and local.

The primary purpose of a comprehensive procedures manual is to ensure employees are informed and consistency is maintained in a school district's operations. A procedures manual also ensures employees are treated fairly and held to common standards and procedures. In the absence of a current procedures manual, supervisors and employees do not always know what the organization is supposed to do, what is expected of employees, what the work standards are, how various situations are to be handled, or how to preserve knowledge when staff turnovers occur.

Maintenance management best practices have shown that formal management procedures are essential for effectively managing and maintaining buildings. At a minimum, such procedures should cover work requests/work orders; work identification; job planning; cost estimating; materials procurement and

control; work scheduling; effectiveness measurement of performance and costs; and historical statistical data.

Procedures for facilities planning, design, and construction management are critical to ensure that the district has safe and functional facilities to provide the best educational environment for its students and district staff. Procedures critical to meeting this expectation should include educational specifications, the capital planning process, and the project budgeting and tracking process.

Comprehensive written custodial management procedures are necessary to ensure that schools are kept clean and safe. The procedures also ensure that minor maintenance services are provided and staff monitors and reports facility repair needs to the appropriate authorities. The School Board of Brevard County Public Schools in Rockledge, Florida has adopted comprehensive custodial procedures that cover all aspects of custodial services to inform its custodians of their roles and expectations. The procedures inform custodians of the required standard procedures, such as rest room cleaning and sanitation, basic office cleaning, and hard surface floor cleaning and maintenance. In addition, the procedures manual includes the Plant Operations and Maintenance mission, objectives, and policies as well as a section for professional custodian standards and customer relations.

VISD should develop and implement comprehensive facility maintenance management policies and procedures. When staff performs their duties without the benefit of up-to-date written procedures, they may fail to perform those functions in a manner that complies with district policies due to being uninformed or misinformed. Written policies and procedures also preserve institutional knowledge in the event of staff turnovers.

All Plant Maintenance administrators should develop detailed written procedures for their areas and combine them to create a district-wide procedures manual. The director of Plant Maintenance should ensure the manual is updated regularly to ensure that

EXHIBIT 5-11

VISD BOARD ADOPTED FACILITY RELATED POLICIES

POLICY / DESCRIPTION	LEGAL	LOCAL
CKA – Safety Program/Risk Management Inspections	X	
CLB – Buildings, Grounds, and Equipment Management	X	X
CV – Facilities Construction	X	
CVB – Facilities Construction Competitive Sealed Proposals	X	X
CVD – Facilities Construction Manager Agent	X	
CVE – Facilities Construction: Construction Manager At Risk	X	
CVF – Facilities Construction: Job Order Contracts	X	
CS – Facility Standards	X	

SOURCE: VISD, Plant Maintenance Department, May 2004.

staff receives accurate information. This tool should provide staff members with detailed procedures to performing critical Facilities Management functions. Moreover, it should institutionalize the district’s vision, philosophy, operating procedures, and general practices. It should clearly communicate acceptable and unacceptable practices as well as the consequences of violating its provisions. The manual should be detailed enough to be useful in daily operations, yet flexible enough to be used by current as well as future employees. At a minimum, the manual should include planning, design, and construction management procedures; maintenance management procedures; and custodial services procedures.

PREVENTIVE MAINTENANCE PLAN (REC. 44)

VISD does not have an adequate system for preventive maintenance that focuses on increasing the performance and extending the useful life of facilities and equipment. The current preventive maintenance plan was developed in December 2002. The plan is essentially a list of activities and how often the activities are intended to take place. However, the plan does not document all preventive maintenance activities nor does it include a formal process for documenting the results of inspections and who is responsible for performing various activities. An aggressive preventive maintenance program has been proven to extend the life of facilities and the fixed equipment required to operate school buildings. VISD has an existing computerized work order management system (CMMS) with the capacity to track, identify, schedule, and prioritize preventive maintenance activities.

Exhibit 5–12 displays opinions regarding general building maintenance. The results show that all

groups, with the exception of principals, had moderately high levels of dissatisfaction with maintenance and repairs being made in a timely manner. All groups were more satisfied with emergency maintenance being handled promptly. These survey results indicate that the lack of a formal preventive maintenance process has affected the timeliness of maintaining and repairing the district’s facilities to meet the needs of its users.

The survey responses are consistent with comments made to the review team during interviews. Specifically, most people commented that maintenance quality and responsiveness is good for immediate and emergency needs, but quality varies for other requests. The lack of a complete preventive maintenance program limits department staff to reacting to equipment breakdowns rather than addressing equipment needs before a breakdown occurs. An inadequate preventive maintenance system ultimately results in increased costs to the district because minor repairs and routine replacement of parts are not done on a timely basis to properly maintain facilities.

Effective school districts establish formal preventive maintenance programs. Districts base the programs on the size, age, and condition of facilities. Older buildings and older equipment, such as HVAC equipment, require more frequent maintenance. Once a district establishes a program, maintenance tasks are scheduled as frequently as needed. Tasks include cleaning and testing air conditioning systems, cleaning plumbing and roof drainage systems, inspecting interior and exterior lighting, performing bleacher maintenance, inspecting and cleaning interior finishes, and assessing exterior lighting. Districts budget and evaluate preventive maintenance costs separately to determine the cost effectiveness

**EXHIBIT 5–12
SURVEY RESPONSES**

<i>SURVEYED GROUP</i>	<i>AGREE / STRONGLY AGREE</i>	<i>NO OPINION</i>	<i>DISAGREE / STRONGLY DISAGREE</i>
Buildings are properly maintained in a timely manner.			
Administrators	54.1%	9.8%	36.0%
Principals	79.5%	0.0%	5.2%
Teachers	38.2%	8.1%	53.8%
Students	31.6%	25.1%	43.3%
Repairs are made in a timely manner.			
Administrators	47.4%	11.3%	41.2%
Principals	79.5%	2.6%	5.2%
Teachers	32.1%	8.1%	59.7%
Students	28.8%	23.7%	47.5%
Emergency maintenance is handled promptly.			
Administrators	70.7%	13.4%	16.0%
Principals	90.3%	5.2%	2.6%
Teachers	55.1%	17.0%	28.0%
Students	40.7%	31.6%	27.8%

SOURCE: Texas School Performance Review, 2004.
NOTE: Numbers may not add to 100% due to rounding.

of each task. Districts often assign dedicated staff to perform preventive maintenance full-time or may assign work orders to all staff. Maintenance staff members assigned to perform preventive maintenance are not routinely reassigned to address other needs.

San Angelo ISD plans scheduled maintenance projects over five years and maintains a database of scheduled projects and budgeted costs. By tracking scheduled maintenance over a five-year period, the district has a factual basis to reasonably estimate their maintenance budget up to five years in the future. Additionally, by scheduling the work in advance, the district is able to make sure that it has the proper supplies on hand to perform the maintenance. **Exhibit 5-13** shows an excerpt of the five-year maintenance plan maintained by the district.

The district should develop a comprehensive preventive maintenance plan to help reduce maintenance costs. The director of Plant Maintenance and Purchasing should develop a preventive maintenance program tied to a computerized work order management system that identifies all preventive maintenance projects needed in the district, provides a detailed schedule by facility, and prioritizes needs. The program should incorporate use of standard designs and equipment to make the most efficient use of staff. The information from the assessments performed by the Plant Maintenance Department could be used to assist in developing a comprehensive preventive maintenance plan.

To properly develop a comprehensive preventive maintenance program, VISD will need to commit substantial resources. Activities will include an inventory of facilities, major equipment, and major building systems. Development will also require research into specific equipment and systems to document maintenance procedures. A benchmark for developing a preventive maintenance program is two to four months per million square feet of facilities. Since VISD operates similar facilities and has a substantial internal Maintenance Department, development time should be at the lower end of the scale.

Assuming two million gross square feet, VISD will require one FTE to develop the preventive maintenance program. An existing management staff position should be allocated to this function; therefore, this recommendation can be performed with existing resources.

WORK ORDER (REC. 45)

VISD uses a computerized maintenance management system (CMMS), but work order requests are submitted either by hard copy, electronic mail, or phone, delaying receipt of work order requests. The district manually processes work orders instead of using the system’s tracking and reporting capabilities, resulting in duplicative data entry. The Plant Maintenance Department does not utilize all of the available CMMS capabilities to prioritize and track its work orders, which contributes to missed services and problems with timeliness. The CMMS system is capable of web-based work order requests; however, VISD has not purchased this upgrade. The Plant and Maintenance Department does not have a formal priority schedule to determine which orders need immediate attention with department staff making priority determinations for each individual work order.

District staff requesting maintenance repairs must fill out a VPS 2050 Maintenance Request Form and email or call the director of Plant Maintenance and Purchasing. Forms are submitted to the work order clerk, and email and phone call requests are forwarded from the director to the clerk. The work order clerk reviews the requests and assigns the order to the appropriate section coordinator. If uncertain which section should receive the work order, the request is forwarded to the director of Plant Maintenance and Purchasing. He then determines which coordinator should receive the request. The work order clerk enters the request in the CMMS system and forwards the work order to the coordinator. The coordinator determines the priority level of the request and delegates the work order to the appropriate maintenance employees. When the work is completed, the maintenance employee documents the date of completion, maintenance employees on the project, hours, and the cost of supplies on the form that is then forwarded to the

EXHIBIT 5-13

SAMPLE SAN ANGELO FIVE-YEAR MAINTENANCE PLAN

SCHOOL NAME	1999-2000	COST	2000-01	COST	2001-02	COST
San Jacinto	Additional security lighting	\$2,500	Modify for ADA requirements	\$25,000	Improve Lighting in cafeteria	\$3,500
San Jacinto	Upgrade electrical service	5,000	Signage to designate visitor drop off	300	Carpet Replacement	55,000
San Jacinto	Replace 4 lavatories / girls	1,000	Add lighting to existing parking	1,800	Replace clouded Plexiglas windows	18,000
San Jacinto	Replace 14 toilet partitions	9,200	Add storage closets	8,000	Repaint upper floor corridor wall	1,200

SOURCE: Texas School Performance Review, San Angelo Report, August 2001.

work order clerk to be closed out of the CMMS system.

The Plant Maintenance staff stated that work orders are not fully researched to determine all specialized areas that need to be addressed. A designated employee is dispatched and he/she calls back if another employee or specialized expertise is required. The director of Plant Maintenance and Purchasing also informed the team that dated yet incomplete work orders are often found in maintenance vehicles. The assigned employee had not completed the work because of a lack of competence with the assigned repair, or the repairman simply misplaced the work order. Plant Maintenance staff also stated that they do not have formal follow-up procedures to ensure customers are satisfied with the work quality and timeliness.

An automated CMMS system can track project status from start to finish if information is properly input into the system. As stated previously, an upgraded CMMS system can provide a web-based work order request feature. This feature allows end users, such as principals and administrators, to initiate a maintenance-work order request using any Internet browser within the intranet, and identify the status of submitted work on the system.

The CMMS system can generate various reports to track trends and sort work orders by assigned staff, date, priority, facility, or type of task. The only report the department currently uses is an aging report that is run once a week. The director of Plant Maintenance and Purchasing and the coordinators review the weekly report to identify dated work orders and then follow-up with the designated employees to determine the status of dated work orders.

Many school districts implement automated tracking and monitoring processes using CCMS and develop a risk-based priority code system with definitions to help prioritize work orders. An example of priority codes used by some school districts is illustrated in Exhibit 5-14.

**EXHIBIT 5-14
WORK ORDER PRIORITY CODES**

CODE	DESCRIPTION	DEFINITION
1	Emergency	Danger to life or property
2	Priority	Possible danger
3	Routine	Daily maintenance repairs
4	Improvement	Changes to facility
5	Summer Work	Summer request
6	Rejected	Request rejected
7	Deferred for study	Future consideration

SOURCE: Texas School Performance Review, Laredo ISD Review, April 2002.

The CMMS allows school district administrators, supervisors, and originators to follow the status of work orders using the following information:

- Date received;
- Priority code;
- Service personnel assigned;
- Percentage completed;
- Date completed; and
- Work completion signature.

When the work has been completed, the appropriate school/facility administrator signs off that the work has been finished, and the maintenance person returns the completed work order to the supervisor. The supervisor then closes out the work order, entering the time and materials used, and then returns it to the service center for data input.

United ISD developed standard expectations of staff hours required to complete each type of work order and compared the expected staff hours to actual work hours to monitor staff productivity.

Crewmembers were required to enter travel time on all work orders. In 1997, the Plant Maintenance Department began a “service call” system that significantly increased productivity. The system assigns work orders by school and allots time to complete specific tasks. One feature of the system is that the principal signs work orders upon completion and records the precise time tasks are completed. In the first three months of implementation, the Plant Maintenance Department workers completed 900 work orders, compared to 600 work orders during a previous three-month period. In 2000, the district projected a five-year savings of approximately \$500,000 per year.

VISD should upgrade the district’s computerized maintenance management system (CMMS) for assigning and tracking maintenance work orders. The upgrade should provide VISD with a web-based work-order request feature. The director of Plant Maintenance and Purchasing should review current CMMS capabilities and identify features that can be immediately implemented to monitor maintenance work in the district. Once upgraded, VISD should provide formal training for the primary system users and at least one of the senior personnel. The system should also be used to track scheduled preventive maintenance information. The district should provide training for at least four staff members to implement preventive maintenance tracking. The automation of work order requests will allow requests to be received more quickly by the Plant Maintenance Department and reduce the need to have the work order information reentered.

Upgrading CMMS to provide the web-based work order request feature will cost the district about \$3,000. VISD should provide training, which will cost about \$3,500, and purchase some implementation services costing an estimated \$2,500 in order to make full use of CMMS features. The total one-time cost to the district is \$9,000.

MAINTENANCE STAFFING (REC. 46)

VISD lacks a well-defined maintenance staffing standard or formula. As a result, VISD’s maintenance staffing levels exceed established standards by more than eight percent, resulting in unnecessary costs to the district. The district does not plan to reduce staff hired to perform a portion of the 1997 bond project that is virtually complete. The director of Plant Maintenance and Purchasing informed the review team that the bond work will be completed in fall 2004, and staff funded by bond money will then be paid through local funds to perform on-going maintenance work.

Exhibit 5-15 lists the current maintenance staff and compares VISD staffing to standards established by the Association of Physical Plant Administrators (APPA). APPA is a national organization that focuses on facilities staffing and operations for educational facilities.

The Plant Maintenance staff also performs after-hour security duties in addition to normal maintenance work. The district staff informed the review team that the maintenance staff works evenings and weekends driving from campus to campus to deter vandalism. The department has been performing this task for approximately two years. The district does

not have a security department. They contract with the City of Victoria Police Department for the services of five police officers that work at the two high school campuses and the three middle schools during school hours. Security guards are hired from private companies for the high schools and middle schools and, like the police officers, these guards work during school hours. In addition, many of the campuses do not have security systems.

The historical trend from 1998–99 through 2002–03 for maintenance costs relating to in-house work in comparison to contracted services is shown in **Exhibit 5-16**.

A closer look at the data in **Exhibit 5-16** identifies trends at odds with the perceptions of staff. The district’s costs from 1998–99 through 2002–03 for contracted services relating to maintenance operations have remained the same while in-house expenditures have continued to increase. Maintenance salaries and wages for the past five years increased by 32.8 percent. Insurance and bonding costs also increased substantially each year, with a five-year increase of 211.7 percent. The Plant Maintenance staff that was interviewed informed the review team that the district has increased its self-performance workload and reduced reliance on outsourcing. Although there is a reduction in contracted services, as seen in the exhibit below, the decrease is due to professional services. Professional services are related to architectural and engineering costs. Contracted maintenance and repair costs remained the same while the miscellaneous costs have increased by 45.5 percent in the past five years.

**EXHIBIT 5-15
VISD MAINTENANCE PERSONNEL VS. APPA STANDARDS 2001-02**

DEPARTMENT	# OF PERSONNEL **	APPA STANDARDS	RECOMMENDED STAFFING	EXCESS (DEFICIENT)
Grounds (includes 2 furniture movers and 1 garbage collector)	23	*	23	0
Electrical (includes an audio visual repairer)	6	1:380,000 GSF	5	1
Air Conditioning	11 (including 2 filter changers and 2 energy management employees)	1:450,000 GSF	4	7
Plumbing	3	1:390,000 GSF	5	(2)
Construction	24	1:200,000 GSF (Carpenters) 1:500,000 GSF (General Maintenance) 1:200,000 GSF (Painters)	10 4 10	0
Welders	1	*	1	0
Work order clerk	1	*	1	0
Vehicle shop	3	*	3	0
Mechanics	3	*	3	0
Total	75		69	6

SOURCE: VISD, Plant Maintenance Department and Association of Higher Education Facilities Officers (APPA).
 *These positions do not have established standards. For this comparison, the actual number of positions was treated as the standard.
 ** Numbers include both licensed and non-licensed employees.

EXHIBIT 5-16
VISD SELECTED ACTUAL EXPENDITURES PER STUDENT
COMPARISON OF IN-HOUSE EXPENDITURES WITH
CONTRACTED SERVICES RELATED TO MAINTENANCE
1998-99 THROUGH 2002-03

OBJECT CODE	1998-99	1999-2000	2000-01	2001-02	2002-03	PERCENT CHANGE FROM 1997-98 TO 2002-03
Costs Associated with Performing Work In-house						
Salaries & Wages	\$305.41	\$340.47	\$360.45	\$383.95	\$405.60	32.8%
Insurance and Bonding Costs	9.31	10.47	10.36	21.34	29.02	211.7%
Total In-house Costs	\$314.72	\$350.94	\$370.81	\$405.29	\$434.62	38.1%
Percent Change		11.5%	5.7%	9.3%	7.2%	
Costs Associated with Contracted Services						
Professional Services	\$10.66	\$8.87	\$0.63	\$0.40	\$1.62	(84.8%)
Contracted Maintenance and Repair	34.66	39.07	31.11	32.90	34.96	0.9%
Miscellaneous Contracted Services	5.67	6.22	6.73	7.56	8.25	45.5%
Total Contracted Services *	\$50.99	\$54.16	\$38.47	\$40.86	\$44.83	(12.1%)
Percent Change		6.2%	(29.0%)	6.2%	9.7%	

SOURCE: Texas Education Agency, PEIMS Function 51 All Funds, 2002-03.

* VISD's contracted services are understated because some contracted services expenditures relating to preventive maintenance are recorded as miscellaneous other operating costs.

Another concern, beyond the cost implications of an internal delivery approach, is that some of the functions may be performed by unlicensed workers, may void warranty work on recent construction projects, may involve hazardous materials that would expose the employee and the district to health risks, may involve accidents that will increase the district's workers' compensation claims, and may involve substantive construction projects for which the district does not have adequate engineering or construction supervisory expertise.

Midland ISD completed an analysis of staffing requirements for handling ordinary facilities repair and maintenance needs. In this analysis, the district determined the number and frequency of specialized work orders and the typical peak workload times. Based on this analysis, the Plant Maintenance Department maintains a small core maintenance staff to meet ongoing facilities repair and maintenance needs, and contracts with private companies during unexpected and peak workloads and for specialized jobs. This practice helps the district avoid significant staff downtime and reduces payroll cost.

VISD should develop staffing formulas for its maintenance workers based on objective industry standards such as those developed by APPA, on peer comparison analysis, and on identified district needs. Staffing should be reduced to meet the objective standards. The departmental work processes, job descriptions and educational credentials, management tools, and accountability should be studied in-depth to realign processes with a customer feedback program. The review team uses the APPA standards in calculating this fiscal impact. Savings will consist of salaries as well as fixed and variable

benefits. Fixed benefits consist of health insurance with a \$2,700 contribution. Variable benefits consist of: Medicare (1.45%), workers' compensation (7.289%), and retirement (0.4%) for a total of 9.139 percent of total salaries. The implementation of this recommendation will result in the elimination of six maintenance positions, resulting in an annual savings of \$185,880. The calculation for this impact is: [\$155,472 salaries (\$25,912 x 6) + \$14,208 (\$155,472 x 9.139%) + \$16,200 (\$2,700 x 6) = \$185,880. This calculation assumes that the district will begin to reduce staff by January 2005 for a total first year savings of \$123,920 [(\$185,880 / 12 months) x 8 months].

CONSTRUCTION MANAGEMENT (REC. 47)

VISD does not have a comprehensive construction management process and lacks well developed construction-related standards. Capital projects involve several sequential steps; scoping to reconcile project needs to the budget; designing, to formally document the construction project; constructing, to physically build the project; and closing out, to formally conclude the project and process any claims during the warranty period. VISD lacks formal procedures for each of these steps and, in some cases; VISD lacks documented standards to ensure that products and activities reflect VISD requirements. VISD's "Recommended Construction Methods and Materials for Future Construction" is about seven pages long. Fully developed construction standards and educational specifications are typically a couple hundred pages each.

As an example, VISD does not have a set of educational specifications. These specifications translate curriculum-related ideas into facility requirements. The facility requirements are typically in the form of standards such as room size requirements; quantity of instruction aids, like marker boards and storage closets; and functional considerations, such as where to locate counselor offices in relation to other spaces. Without specifications, designers have no guidance on how to ensure facilities meet long-term needs and design solutions are equitable across the district. One example where a lack of specifications was noticeable to the review team involves Crain Middle School and Chandler Elementary School. The new classroom wing at Crain Middle School has electric projection screens in most of the classrooms. These screens are expensive to purchase and install and are not typically used in classroom settings. Chandler Elementary School was constructed about the same time as the Crain addition. In the administration suite at Chandler Elementary, there are several offices for administrators and itinerant staff without small windows in the doors or walls. Windows are customarily used for school office settings where a student might meet alone with an adult. Staff at Chandler Elementary indicated that throughout the design process very few changes were pursued.

The primary construction activities reporting method is the “DragonSlayer” report, which is prepared about every six months. While the report shows current status, it does not contain project management indicators, such as comparisons of budgets, forecasts, and actual expenditures or project schedules. In fact, VISD does not maintain this information in any format. While reporting the information is important, another equally important use of this information is for evaluating the designers and contractors, with a focus on future projects.

Fort Bend ISD developed prototype models to ensure that the construction and renovations projects of its elementary, middle, and high schools are cost effective and built to standard. The prototypes are described in the educational specifications developed and updated by the Construction Section. The use of prototype facilities has kept district construction costs below what it would cost to use unique designs. Fort Bend ISD has also developed a project-tracking reports system to improve the quality and cost effectiveness of its construction projects. The department uses a variety of reporting tools to monitor all new construction and renovations. The following are some of the reports used:

- Monthly construction department work-in-progress reports for the board;

- Project observation reports on all ongoing projects;
- Inspection request reports requested of the contractor; and
- Material testing report reviews on all material used by contractors.

VISD should develop formal construction management standards to monitor future construction and renovation projects. The following standards should be developed: format and procedure for project definition; methodology for determining in-house versus contracted projects; educational specifications; computer-aided design (CAD) standards; construction estimate and budget format and protocols; construction specifications; construction schedule format and protocols; project close-out procedures; project evaluation process; and proactive warranty claim processes.

CUSTODIAL STAFFING / WORK SCHEDULES (REC. 48)

VISD is overstaffed in custodial operations, staffing formulas do not match industry standards, and the scheduling of workers is inefficient. This overstaffing of custodial positions and the inefficient scheduling of workers costs VISD funds that could otherwise be allocated to other needs.

The staffing formula used by VISD has been in place since the 1980s. VISD staff stated that the current formula is referred to as the “A&M formula.” A copy of the formula, without any reference to its origin, was provided to the review team. The formula appears on two pages photocopied from a small pamphlet. By observation, the formula appears to have been typed on a typewriter and appears to date back to the 1980s. Regardless of its origin, the formula is outdated and no longer a relevant standard for school districts in Texas and nationwide. The A&M formula provides that each custodian is assigned an area based on the following factor based formula:

- Number of campus teachers divided by eight;
- Number of campus students divided by 225;
- Number of campus classrooms divided by 11;
- Campus square footage divided by 15,000;
- Acreage of campus divided by two; and
- Add total factors, divide by five, multiply by eight, and divide by eight for the number of custodians per campus.

As shown in **Exhibit 5-17**, the district does not completely follow its own staffing formulas. Even though the district has excessive staffing levels, many

**EXHIBIT 5-17
VISD CUSTODIAL STAFFING
2003-04**

SCHOOL	CURRENT CUSTODIANS	PERMANENT AND PORTABLE AREA (GSF)	TOTAL CUSTODIANS REQUIRED PER VISD STANDARD	TOTAL CUSTODIANS REQUIRED PER INDUSTRY STANDARD (1 PER 19,000 GSF)	DIFFERENCE BETWEEN CURRENT CUSTODIANS AND CUSTODIANS REQUIRED PER INDUSTRY STANDARD (1 PER 19,000 GSF) OVER/(UNDER)
Aloe Elementary	4.50	59,563	5.76	3.13	1.37
Chandler Elementary	5.50	72,681	5.40	3.83	1.67
DeLeon Elementary	5.00	59,773	4.80	3.15	1.85
Dudley Elementary	5.50	65,429	4.98	3.44	2.06
FW Gross Elementary	4.00	48,514	4.17	2.55	1.45
Guadalupe Elementary	1.50	22,305	2.08	1.17	0.33
Hopkins Elementary	5.00	64,383	6.73	3.39	1.61
Juan Linn Elementary	5.00	56,117	4.28	2.95	2.05
Mission Valley Elementary	2.00	27,151	2.87	1.43	0.57
O'Connor Elementary	6.00	66,321	5.37	3.49	2.51
Rowland Elementary	6.00	65,724	5.17	3.46	2.54
Shields Elementary	5.50	67,286	5.52	3.54	1.96
Smith Elementary	5.50	61,220	5.00	3.22	2.28
Vickers Elementary	5.00	62,272	4.92	3.28	1.72
William Wood Elementary	2.00	22,418	2.18	1.18	0.82
Crain Middle School	12.00	127,282	9.04	6.70	5.30
Howell Middle School	8.00	135,904	8.99	7.15	0.85
Patti Welder Middle School	13.00	103,592	11.18	5.45	7.55
MHS – Stroman	16.00	259,563	24.80	13.66	2.34
MHS – Senior	17.00	204,786	7.00	10.78	6.22
Athletic Ag Bldg & Port Bldg	3.00	86,382	2.64	4.55	(1.55)
Career Development School	2.00	75,600		3.98	(1.98)
Coleto Creek	1.00	8,876	1.00	0.47	0.53
Mitchell Guidance Center	2.00	24,154	1.42	1.27	0.73
Profit Academic	2.00	19,658	2.00	1.03	0.97
Administration	3.00	38,200	5.51	2.01	0.99
Athletic Office	*	768	2.64	0.04	(0.04)
Family Connection	*	4,860		0.26	(0.26)
Hope School	*	5,040		0.27	(0.27)
Maintenance	3.00	23,500	3.00	1.24	1.76
Transportation	*	3,200		0.17	(0.17)
Total	150.00	1,942,522	158.45	102.24	47.76
Full-time Equivalent Adjustment	(7.00)				
Total Full-time Equivalent	143.00			102.24	40.76

SOURCE: VISD, Plant Maintenance Department, May 2004 and Association of School Board Officials (ASBO) Custodial Standards.

* The three custodians noted by Maintenance also clean these areas.

NOTE: The Association of School Business Officials (ASBO) standards are 20,000 square feet per custodian; however, the review team is using 19,000 square feet to compensate for the inadequate equipment, age of buildings, and vandalism problems experienced by the district.

principals complain about a lack of custodial staff due to the following:

- Vandalism occurring in the high schools and middle school restrooms;
- Inadequate, minimal, or obsolete janitorial equipment;
- Custodians are assigned lunchroom duty; and
- Transferring poor performing custodians from other campuses.

In 2003-04, VISD employed 150 custodians.

Exhibit 5-17 shows current staffing levels and allocations based on VISD standards and recognized industry standards.

The staffing formula used by the district shows that the district needs approximately 159 custodians total, while the industry standard formula recommends a total of 102 custodians, a difference of 57. The district currently employs 150 custodians; however, several of these custodians work part-time. The district has a total of 143 full-time equivalents, which is a difference of 40.76 from the industry standard total.

Interviews with principals and head custodians revealed that the district is experiencing significant numbers of vandalism incidents in the high school and middle school bathrooms. Examples of vandalism are graffiti, throwing rolls of toilet paper

or paper towels in toilets, and yanking paper towel or toilet paper dispensers from the wall. The vandalism occurring in bathrooms and efforts to use custodians to deter this behavior partially explain why the schools overstaff custodians at the high schools and middle schools. Bathrooms have to be cleaned more frequently at these campuses, thereby requiring more day-shift staff at these campuses.

The head custodians interviewed by the review team stated they needed more positions because they do not have adequate time after school hours to thoroughly clean the facilities. The district has two shifts for custodians and the shift times vary by campus. The morning shift for most campuses starts at 7:00 a.m., with some employees working four hours and others eight hours per day. The second shift begins at some campuses at 10:00 a.m. and 11:00 a.m. at others. The second shift employees work until 7:00 p.m. Two head custodians are assigned to each high school campus and each of the three middle schools. One head custodian works the morning shift while the other works the second shift. Most custodians work the second shift. District staff that was interviewed stated that second shift custodians come in at 11:00 a.m. to assist with cafeteria duty, which includes disposing of trash, cleaning tables, and mopping spills. The custodians are not responsible for cleaning the kitchens; this responsibility is assigned to the Food Services staff.

The scheduling of second shift custodians during the school day adversely affects productivity. Head custodians at two schools said not much cleaning is done while kids are there. Custodians must clean hallways and bathrooms at least twice a day because of constant student use and vandalism throughout the day.

San Angelo ISD maximizes the efficiency of the custodial staff through scheduling. At the high schools and middle schools, one custodian typically works from 6:00 a.m. to 3:00 p.m., one custodian works from 9:00 a.m. to 6:00 p.m., and the other custodians work from 2:00 p.m. to 11:00 p.m. At the elementary schools, typically one custodian works a split shift from 7:00 a.m. to 12:00 p.m. and 4:00 p.m. to 7:00 p.m., and the remaining custodians work from 12:00 p.m. to 9:00 p.m. By arranging the custodial schedules in this way, the district maximizes the efficiency of the custodial staff by allowing most of the custodians to work after school hours while, at the same time, always having at least one custodian working during school hours.

The Association of School Business Officials (ASBO) publishes standards for custodial operations. The ASBO standard is 20,000 GSF per custodian. Using this standard, the district is overstaffed by a

substantial number of positions. VISD’s peer districts have successfully implemented custodial standards at 19,000 to 20,000 GSF per custodian, as illustrated in Exhibit 5–18.

**EXHIBIT 5–18
PEER DISTRICTS CUSTODIAL
STAFFING STANDARDS
2003–04**

SCHOOL DISTRICT	CUSTODIAL STAFFING STANDARD
Bryan ISD	20,000*
Lamar CISD	20,000
Tyler ISD	19,000

SOURCE: Bryan ISD, Lamar ISD, and Tyler ISD, May 2004.

* Bryan ISD uses the Texas Association of School Business Officials recommended gross square feet; however, it modifies it based on the type of programming and after school use of the facility.

The district should develop staffing formulas based upon objective industry standards and use those formulas to immediately reduce staff. In addition, the custodial supervisor and head custodians should develop more efficient work schedules with more cleaning after school. The practice of using custodians to monitor halls and restrooms should be discontinued. The district should consider using employees in the workers’ compensation return-to-work program to cover hall and bathroom monitoring. Using limited duty employees to perform these jobs will allow the custodians more time to concentrate on cleaning schools. Another benefit of assigning these employees to perform hall and bathroom monitoring duties is to deter vandalism.

Exhibit 5–17 indicates that VISD is overstaffed by 41 custodial positions (143 current full-time equivalents – 102 industry standard). The review team used 19,000 instead of the recommended industry standard 20,000 GSF because it took into consideration problems the district is experiencing with vandalism and the poor quality of the janitorial equipment. The analysis does not round custodial positions at the school level, assuming an efficient organization. As discussed earlier in the chapter, 12 custodian positions would be eliminated with the closing of three elementary schools. Therefore, to be conservative, this fiscal impact reduces the number of custodians to eliminate from 41 to 29 employees (41 custodians overstaffed – 12 custodians eliminated with the closing of three schools).

Efficient districts proactively use schedules to increase efficiency of custodial staff and regularly assign staff to multiple locations. While complete efficiency may not be feasible, VISD should be able to eliminate most of the excess positions. Savings will consist of salaries as well as fixed and variable benefits. Fixed benefits consist of health insurance

with a \$2,700 contribution. Variable benefits consist of: Medicare (1.45%, workers' compensation (7.289%), and TRS (0.4%) for a total of 9.139 percent of total salaries. Eliminating 29 positions from the custodial staff will save VISD \$551,986 per year. These costs are calculated by assuming an average annual salary of \$14,966 per position. Annual benefits amount to \$4,068 per position (\$1,368 variable benefits + \$2,700 insurance). Total annual salary is \$19,034 (\$14,966 salary + \$4,068 benefits). Total savings is achieved through 29 positions at \$19,034 per position (\$19,034 x 29 = \$551,986). The savings for 2004–05 will not begin until January 2005 for a first year savings of \$367,991 [(\$551,986 total annual savings / 12 months) x 8 months = \$367,991].

JANITORIAL EQUIPMENT (REC. 49)

VISD's cleaning equipment is outdated and affects work quality and staff productivity. The principals and head custodians stated their concerns with the quality and supply of janitorial equipment. For example, the head custodians stated that vacuum cleaners are not industrial quality and frequently breakdown. In addition, the quality of the cleaning suffers because equipment is not powerful enough to do a professional job. There are too few vacuum cleaners for the larger campuses, and custodians must frequently retrieve vacuum cleaners from a different building or floor, which results in lost productivity. The condition of the district's equipment impacts the quality of custodial services and may be a contributing factor to the custodians' belief that they are understaffed, when staffing benchmarks actually reflect that significant overstaffing exists.

Galveston ISD significantly changed its custodial operations and procedures to improve the cleanliness of its schools. The district updated the equipment used by custodians, such as buffers, to increase productivity, limit personnel requirements, and increase cleaning quality.

VISD should develop a janitorial equipment replacement plan and purchase only industrial quality equipment. The custodial supervisor should assess the janitorial equipment used at each school to determine the most critical needs in the district and develop a timeline to address these needs. When the current critical needs are corrected, the district should establish a formal janitorial equipment replacement plan to complete the remaining items. The plan should include a general policy statement; replacement cycles based on the average useful life of each major type of equipment; procedures for review of the replacement policy; estimated annual funding

requirements; and standard specifications for equipment purchases.

The fiscal impact of this recommendation takes into consideration that the district has not made sufficient acquisitions of janitorial equipment. Therefore, the district should budget \$23,330 per year until it has purchased all the equipment identified as critical. Thereafter, expenditures can be adjusted to conform to the life-cycle replacement plan that was developed based on this recommendation.

This fiscal impact assumes that VISD schools need a total of 79 vacuums [(15 elementary schools x 3 vacuums for each school) + (3 middle schools x 5 vacuums for each school) + (2 high school campus x 8 vacuums for each campus) + (3 alternative education centers x 1 vacuum for each center)]. The cost of a commercial brand vacuum can range from \$600 to \$1,100. The cost of 79 vacuum cleaners at an average cost of \$850 totals \$67,150.

In addition, this fiscal impact assumes that the district needs a total of 33 industrial grade floor buffers [(15 elementary schools X 1 buffer for each school) + (3 middle schools X 2 buffers for each school) + (2 high school campus X 5 buffers for each campus) + (2 alternative education centers X 1 buffer for each center)]. The cost of commercial brand buffers can range from \$1,000 to \$2,000. The cost of 33 industrial floor buffers at an average cost of \$1,500 totals \$49,500.

The total amount for commercial vacuum cleaners and floor buffers over the next five years is \$116,650 (\$67,150 + \$49,500). The total amount to budget for janitorial equipment for the next five years is \$23,330 (\$116,650 total cost of equipment / 5 years = \$23,330).

CONTRACTED SERVICES (REC. 50)

The district does not regularly perform cost-benefit analysis to determine if certain services should be performed by VISD personnel or contracted to the private sector. VISD underutilizes outsourcing as an alternative for certain maintenance functions. VISD does not contract many maintenance related services, but rather self-performs most services. In some cases, such as mechanical and electrical maintenance, VISD personnel form the first layer of service with contracted companies available as extended capacity in the event of increased demand. Some of the services VISD performs that may be candidates for contracting, either partially or fully are:

- General renovations to classrooms;
- Installation of new mechanical equipment and systems for school renovations;

- Construction and installation of casework (cabinetry);
- Repair of small electronic equipment such as VCRs;
- Trash collection and dumping; and
- Grounds services.

Midland ISD hires a small core maintenance staff augmented by contractors for peak loads. Midland ISD performed an analysis of staffing requirements for ordinary facilities repair and maintenance needs. In this analysis, the number and frequency of specialized work orders and the typical peak workload times were determined. Based on this analysis, Midland ISD's Maintenance Department now maintains a small core maintenance staff to meet ongoing facilities repair and maintenance needs. Unexpected and peak workloads, as well as specialized jobs, are contracted to private companies. By using this management practice, Midland ISD's Maintenance Department avoids significant amounts of staff downtime.

VISD should establish methodology for cost-benefit analysis of contracted services and perform analysis to determine which, if any, services should be contracted to the private sector. The director of Plant Maintenance and Purchasing and the chief financial officer should lead the effort to establish analysis methodology. In general, the analysis should include direct costs of personnel, equipment, and supplies as well as indirect costs, such as the impact on management time, insurance, and licensing. In addition, the analysis must account for the level of service requirements. For instance, VISD currently collects and hauls trash from each school every day. The cost-benefit analysis should determine if this is the appropriate level of service for any or all schools and then determine the cost of providing this service versus contracting with a private firm. Finally, VISD should verify the cost of contracting for services by actually putting the service out to bid. This will ensure that the private sector cost is accurate. In these cases, the analysis period and the bid should span at least three years.

ENERGY MANAGEMENT SOFTWARE (REC. 51)

VISD does not employ the tools or techniques necessary to perform ongoing energy management. As a result, the district is not tracking energy consumption trends to identify unusual consumption rates. In addition, the district does not prepare energy usage reports to determine opportunities for cost reduction.

VISD currently has the FASER V energy management software package. This package is

nearly obsolete and will not be supported beyond calendar year 2004. The replacement package, EnergyCAP, is available, but VISD has not yet upgraded to this system or another energy management software package. FASER V is still running on a single computer and data has not been entered for over two years.

Districts that practice energy management effectively measure consumption at the lowest reasonable level compared to standards or peers. Typically, energy usage is divided by the area of a facility to yield a measurement that can be compared across facilities to identify trouble spots, anomalies, and opportunities for targeted energy reduction investments. For most school districts, the primary measure of energy consumption is dollar to square foot at the school level. This analysis is typically performed in a software package that allows users to input nearly all information from utility bills in order to perform analysis.

VISD should implement software upgrades and internal procedures to support continuing energy management analysis. The software upgrade provides an ability to house data, perform analysis on consumption, and report findings. When the new system is in place and all data is entered, the director of Plant Maintenance and Purchasing should prepare an energy usage report covering the past five years to identify where VISD is performing well and where there are still opportunities for cost reduction.

The software upgrade will cost approximately \$10,000, with an annual maintenance fee of \$995 per year beginning in year two. VISD personnel will also require training for the energy manager and the data entry clerk. The total cost for training is approximately \$5,000. A data entry clerk will require approximately 280 hours to input the backlog of bills. This fiscal impact assumes that the district will hire a temporary data entry clerk to enter this data. Assuming an hourly rate of \$10, the cost for this service will be \$2,800 (\$10/hr X 280 hrs). The total one-time cost therefore is approximately \$17,800 (\$2,800 data entry + \$10,000 software + \$5,000 training). An additional \$995 for maintenance fees will be due for all subsequent years.

Closely monitoring energy usage will typically identify areas of waste and result in decreased consumption. Therefore, this recommendation assumes there will be a 5 percent savings, which translates to \$94,834 per year (\$1,896,688 current utility costs x 5 percent). This fiscal impact also assumes that the district will implement the software in January 2005; therefore, the prorated savings for 2004–05 is approximately \$63,223 in the first year [(\$94,834 savings \ 12 months) x 8 months].

The total fiscal impact for this recommendation will result in a net savings of \$63,223 for year one, a net savings of \$93,839 (\$94,834 energy savings - \$995 maintenance fees) for all subsequent years, and one-time costs of \$17,800.

ENERGY CONSUMPTION (REC. 52)

VISD does not hold personnel accountable for energy use and does not proactively provide energy management education to personnel whose actions most directly affect energy usage. The people most able to control energy consumption through direct action are school personnel, who control room temperatures, lighting, and use of energy consuming appliances. The district periodically circulates an energy consumption checklist (referenced as shutdown checklists) to elevate energy awareness. However, reports on energy usage are not provided to these personnel and they are not held accountable for energy use at their schools. In addition, energy education is provided to school personnel and administrators only when asked of the energy manager.

Typically, a school district's Facilities department has an energy manager position that is responsible for developing and maintaining an energy conservation program. One of the energy manager's responsibilities is to develop energy consumption reports that are reviewed and analyzed to identify discrepancies or abnormal consumption rates. The energy manager distributes a monthly report to each principal and administrator. Schools or facilities that show abnormal consumption rates are immediately inspected to identify the reason for the change.

Successful school districts develop energy awareness programs to educate administrators, teachers, district staff, and students about energy conservation. Spring ISD has developed a successful program that has helped the district keep its energy costs within industry guidelines. Spring ISD developed a rebate program that rewards efficient energy use by sharing savings with any school that reduces its usage below the budgeted amount. The school receives a check for 50 percent of the savings amount. The office of Construction and Energy reviews actual energy costs against budgeted amounts and sends a monthly report to each school. Principals encourage students and staff to participate in activities, such as turning off lights when leaving a room and closing doors to retain conditioned air in the classrooms. Some principals have encouraged operations staff cooperation by sharing cost savings with the mechanics. The district has saved from 7 to 14 percent per year for the five years of the rebate program.

VISD should make the Energy manager accountable, establish energy consumption accountability at the school level, and require periodic energy usage education. The director of Plant Maintenance and Purchasing and the Energy manager should establish the content and format of a periodic energy consumption report. The report should include performance indicators for peer facilities so that individual locations can identify how they are performing against similar facilities. On an annual or bi-annual basis, the energy manager should visit each location to review historic energy usage with personnel, facilitate usage reduction methods appropriate for the particular location, and provide personnel with an update of district-wide energy conservation measures.

PLANT MAINTENANCE ORGANIZATION (REC. 53)

VISD's Plant Maintenance Department's organizational structure is not logically aligned to promote efficient and effective facilities planning, design, and construction functions. Clearly established responsibilities for planning, design, and construction management are lacking and appear to be blended into the responsibilities of maintenance management and planning. The department staff stated that the Construction coordinator and Mechanical, Electrical, and Plumbing (MEP) coordinator share the responsibilities along with the director of Plant Maintenance and Purchasing for performing maintenance management and planning, design and construction planning, design, and management. The absence of an adequate planning, design, and construction management function is most visibly demonstrated by the fact that the district has not developed up-to-date facilities plans or enrollment projections. The most recent facility planning documents for VISD were created in 1996–1997, when the last major capital bond issue was being considered.

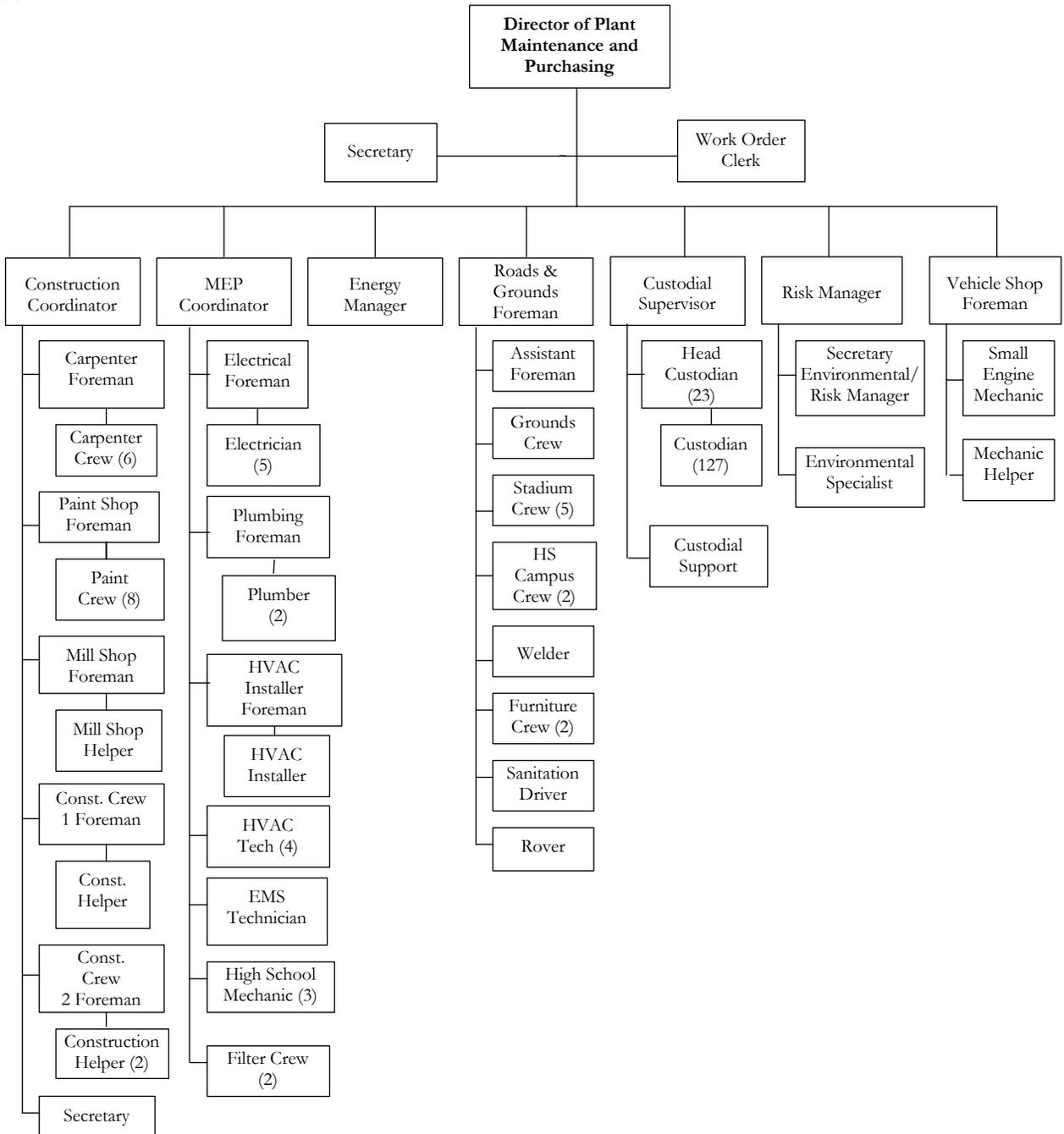
The Construction coordinator described his main responsibilities as painting and the supervision of carpentry and the mill shop, while the MEP coordinator reported his responsibilities as the supervision of the Heating, Ventilating, and Air Conditioning (HVAC, sometimes referred to as mechanical), electrical, and plumbing. The responsibilities described by both coordinators appear to be more in line with maintenance management and not related to planning, design, and construction. The review team did not identify in written functional job descriptions any positions that included responsibility for facilities planning, preventive maintenance planning, enrollment projections, student capacity, and educational

adequacy studies of existing facilities, even though these are important elements of a comprehensive facilities planning, and maintenance function.

Additionally, the position titles in the Plant Maintenance Department organization chart (Exhibit 5-19) do not identify positions that are

normally associated with the critical functions of facilities planning, design, and construction management. However, the director and coordinators stated in interviews that they collaborate to cover these functions.

EXHIBIT 5-19
PLANT MAINTENANCE ORGANIZATION CHART
2003-04



SOURCE: VISD, Plant Maintenance Department, 2004.

Many school districts the size of VISD organize facilities management functions using either a four- or two-section model.

An organizational structure with four sections would include: a Facilities Planning, Design, and Construction section that is responsible for the planning and design of capital improvement projects ranging from major building repairs through construction of new facilities; a Maintenance section, which performs most building repair projects, preventive maintenance, energy management, and vehicle maintenance; a Custodial Operations section that is responsible for general cleaning of facilities; and a Road and Grounds Services section that is responsible for maintaining the district’s school and athletic grounds and also providing detailed landscaping services, including weeding, edging, pruning, and watering designated lawn and landscape areas. Galena Park uses a four functional section organizational structure. **Exhibit 5–20** shows Galena Park ISD’s high-level organizational structure.

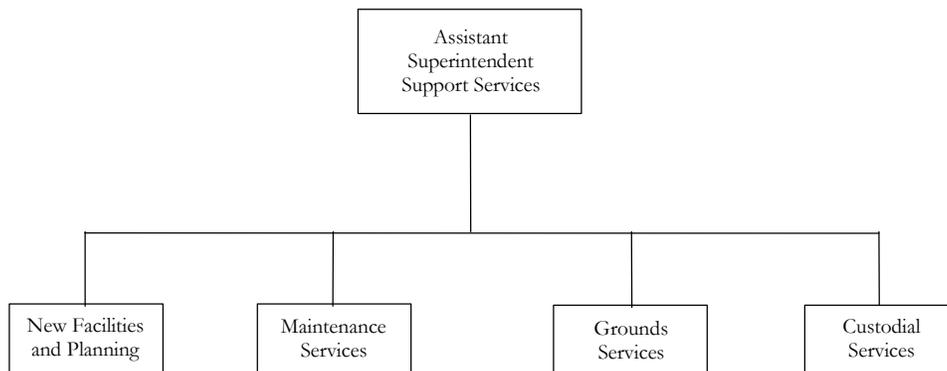
An organizational structure with two sections includes a maintenance management section and a facilities planning, design, and management section. The maintenance management section

responsibilities include combining the maintenance, custodial, and grounds services functions identified in the four-section model identified above.

VISD should reorganize the Plant Maintenance Department to ensure that all aspects of a comprehensive facilities operation, including the facilities planning, design, and construction management functions, are properly assigned and being performed. The director of Plant Maintenance and Purchasing and Plant Maintenance coordinators, with the assistance of the Human Resources Department, should research other school districts’ facility departments to identify an organizational structure that will work for VISD’s environment. Each position should be evaluated, and job descriptions revised and realigned to conform to the new organizational structure. Clarification of functions to clearly assign responsibility for facilities planning, design, construction management, and organizational reporting reassignments are envisioned in this reorganization process.

For background information related to Facilities Construction, Use, and Management, see p. 204 in the General Information section of the Appendices.

EXHIBIT 5–20
GALENA PARK ISD FACILITY FUNCTIONS
2002–03



SOURCE: TSPR Galena Park ISD School Performance Review, March 2003.

FISCAL IMPACT

RECOMMENDATION	2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
CHAPTER 5: FACILITIES CONSTRUCTION, USE, & MANAGEMENT							
36. Develop a short-term plan to alleviate overcrowding at the Stroman High School campus.	\$0	\$0	\$0	\$0	\$0	\$0	(\$50,000)
37. Close three of the elementary schools and adjust the attendance zones to achieve an optimum efficiency factor of 90 to 95 percent in the remaining 12 elementary schools.	\$0	\$971,496	\$971,496	\$971,496	\$971,496	\$3,885,984	\$0
38. Monitor the usage of portables on an ongoing basis and substantially reduce the use of portables at the elementary schools.	\$0	\$50,496	\$50,496	\$50,496	\$50,496	\$201,984	\$0
39. Develop five-year enrollment projections for all schools by grade level, and update projections annually.	(\$34,000)	(\$24,000)	(\$24,000)	(\$24,000)	(\$24,000)	(\$130,000)	\$0
40. Conduct a comprehensive facilities assessment that provides VISD with detailed information regarding the condition of school and administrative facilities.	\$0	\$0	\$0	\$0	\$0	\$0	(\$160,000)
41. Prepare a long-range facilities master plan.	\$0	\$0	\$0	\$0	\$0	\$0	(\$140,000)
42. Develop a comprehensive and consistent facilities reporting mechanism and report to the Facilities committee at least four times per year.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
43. Develop and implement formal facilities maintenance management policies and procedures.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
44. Develop a preventive maintenance plan to help reduce maintenance costs.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
45. Upgrade the district's automated process for assignment and tracking of maintenance work orders.	\$0	\$0	\$0	\$0	\$0	\$0	(\$9,000)
46. Develop staffing formulas and reduce maintenance staffing.	\$123,920	\$185,880	\$185,880	\$185,880	\$185,880	\$867,440	\$0
47. Develop formal construction management standards to manage future construction and renovation projects.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
48. Revise custodial staffing formulas and develop more efficient work schedules with more work done after school.	\$367,991	\$551,986	\$551,986	\$551,986	\$551,986	\$2,575,935	\$0

FISCAL IMPACT (CONTINUED)

RECOMMENDATION		2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
CHAPTER 5: FACILITIES CONSTRUCTION, USE, & MANAGEMENT								
49.	Develop a janitorial equipment replacement plan and purchase only industrial quality equipment.	(\$23,330)	(\$23,330)	(\$23,330)	(\$23,330)	(\$23,330)	(\$116,650)	\$0
50.	Establish a methodology for the cost-benefit analysis of contracted services, and perform analysis of maintenance and construction activities to determine which, if any, services should be contracted to the private sector.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
51.	Implement software upgrades and internal procedures to support continuing energy management analysis.	\$63,223	\$93,839	\$93,839	\$93,839	\$93,839	\$438,579	(\$17,800)
52.	Establish energy consumption accountability at the school level and require periodic energy usage education.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
53.	Reorganize the Plant Maintenance Department to ensure that all aspects of a comprehensive facilities operation, including the facilities planning, design, and construction management functions, are properly assigned and being performed.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Totals-Chapter 5		\$497,804	\$1,806,367	\$1,806,367	\$1,806,367	\$1,806,367	\$7,723,272	(\$376,800)

CHAPTER 6

SAFETY AND SECURITY

One of the most critical issues facing school districts is the safety and security of the adults and children that work, attend class, or visit its facilities. No Texas community—large or small, urban or rural, prosperous or poor—is immune from the potential of violence. As schools are faced with the reality that violence can happen anywhere, educators, businesses, and parents must plan for potential problems and initiate solutions before a crisis occurs. This requires that policies and programs be in place to address the needs of the district and the unique environment in which it operates.

All areas that share responsibility for a safe and secure school are critical in delivering effective, clearly communicated initiatives and selecting an approach appropriate to their environment and strategies.

VISD collaborated with the City of Victoria Police Department (VPD) to develop a School Resource Program in 1992. One VPD sergeant and five VPD officers, referred to as “School Resource Officers” (SROs), were hired to work at the two high school campuses, the three middle schools, and the Mitchell Guidance Center. The SROs are considered employees of the VPD and report directly to the VPD chief of police. The assistant superintendent of Administration communicates directly to the VPD chief of police if there are personnel issues or procedural changes to be addressed.

In addition, the district employs 10 security guards at the Memorial High School campuses. Five security guards report to the Stroman campus associate principal, and the remaining five report to the principal at the Senior campus. The security guards are responsible for assisting campus administrators achieve orderly school operation; monitoring activities to prevent theft, vandalism, burglary, and other criminal or inappropriate behaviors; monitoring campus pedestrians and vehicular traffic day and night; reporting suspicious and/or unusual activity; checking suspicious circumstances; following established safety procedures and techniques to perform job duties; and communicating with supervisors, staff, teachers, students, the public, and law enforcement agents when deemed necessary, to deter unsafe or illegal situations.

Each middle school hires security guards from a private security company. Two contracted security guards work at each middle school for two hours each day during the lunch period. Mitchell Guidance Center also hires private security guards. It has two

full-time security guards. Profit Academic Center has no security guards at all

FINDINGS

- VISD’s safety and security services are decentralized and do not ensure a single point of contact and responsibility.
- VISD does not effectively manage the safety and security needs of its schools, as evidenced by a high rate of disciplinary incidents and an increase in criminal mischief.
- VISD does not have a comprehensive long-range safety and security plan that outlines a strategic direction for administrators, teachers, staff, SROs, and security guards.
- VISD’s security guards are not properly trained in preventing disciplinary incidents.
- VISD does not ensure all schools include violence prevention and intervention plans in their campus improvement plans (CIPs), as required by the Texas Education Code (TEC).
- VISD’s student code of conduct is unclear and does not ensure equity in discipline.
- VISD does not have a district-wide discipline hearings officer, resulting in inconsistent and excessive placement of students into the district’s disciplinary alternative education center.
- VISD’s in-school suspension program does not effectively support learning or change disruptive behavior.
- VISD does not provide the board or community with comprehensive disciplinary incident reports.
- A reduction in 2003–04 in parent liaison positions and inefficient administrative processes are impeding the district’s ability to combat truancy.
- VISD does not make the facility, grounds, and system improvements necessary to make its schools safe and secure.
- VISD’s Emergency Disaster Manual is outdated and is missing critical elements.
- VISD schools do not have an effective means to identify campus visitors, students, and employees.

RECOMMENDATIONS

- **Recommendation 54 (p. 91): Consolidate all safety and security functions under one district-level administrator.** This position should be responsible for coordinating all safety

and security programs, monitoring school security needs, and ensuring crisis management plans are modified as needed. Employees responsible for issues related to district safety, security, crisis management, discipline management, and wellness should report to this position regarding safety issues.

- **Recommendation 55 (p. 92): Hire a chief of police and additional security guards.** The district should hire a chief of police to organize and staff a Safety and Security Department, and hire three full-time security guards, one for each of the middle schools. The police chief would be directly responsible for supervising the district's security guards and would oversee the School Resource Officer Program.
- **Recommendation 56 (p. 95): Develop a long-range, comprehensive safety and security plan, and ensure that the plan includes performance measures.** The plan should include a mission statement, long-term goals, measurable objectives, and strategies to achieve goals. In addition, the plan should be coordinated with the Victoria Police Department's long-range plans for the School Resource Officer Program. With a comprehensive plan, the district can measure the department's actual performance against its planned performance and inform stakeholders of progress. The performance measures must be easy to use, easy to understand, inexpensive to implement, and link performance to costs.
- **Recommendation 57 (p. 96): Provide ongoing in-service training for security guards.** The district should implement a training program to ensure that security guards are using effective and consistent methods to deter disciplinary incidents.
- **Recommendation 58 (p. 96): Ensure that all schools address violence prevention and intervention in their campus improvement plans.** The district should ensure that all CIPs address violence prevention and intervention strategies, as required by the Texas Education Code. Beyond complying with state regulations, by requiring schools to include violence prevention and intervention plan in their CIPs, the district reinforces the importance of anticipating and planning for crisis situations to reduce the risk to students and staff.
- **Recommendation 59 (p. 96): Modify the district's student code of conduct to align student disciplinary offenses with consequences to ensure consistent**

application of discipline management practices, and publish a Spanish version of the code. The district should match its disciplinary sanctions more appropriately to the seriousness of the offense and make the student code of conduct more internally consistent. The student code of conduct should include expectations for student conduct, guidelines for assessing penalties, and levels of offenses based on the severity of the offense.

- **Recommendation 60 (p. 98): Reinstate a district-level hearings process for student code of conduct violations involving disciplinary alternative education program (DAEP) placements to ensure consistency and due process.** The district level hearings process should be assigned to the director of Student Services. Adding the DAEP hearings workload to the existing expulsion hearings will require the district hire a new coordinator level position to assume some of tasks currently assigned to the Student Services director. The Student Services director also should monitor and track student disciplinary actions to identify trends and suggest intervention strategies.
- **Recommendation 61 (p. 100): Assign certified teachers to the high school in-school suspension (ISS) centers and increase the instructional focus of this program.** The district should ensure that all ISS centers are staffed with certified teachers to provide students an adequate instructional setting. The district should also develop a behavioral management program to provide discipline management classes to students in the ISS program.
- **Recommendation 62 (p. 101): Prepare comprehensive reports of disciplinary incidents and develop additional prevention and intervention programs to improve student behavior.** The superintendent, or designee, should prepare comprehensive disciplinary incident reports and distribute them to board members, school administrators, teachers, parents, and site-based decision-making committees at least once a year. The report should include graphs and tables to clearly illustrate problem areas, and it should be used to generate discussion and ideas for reducing student misbehavior.
- **Recommendation 63 (p. 102): Hire parent liaisons for the middle schools and automate administrative processes to help raise the district's attendance to a minimum of 95.5 percent at all secondary schools.** The district

should hire three parent liaisons for the middle schools and allow attendance officers to fully dedicate their time to truancy issues. The district should also ensure that all classrooms have computer access to enable teachers to record attendance online using the district's attendance software. The district's truancy management plan should include appropriate compulsory attendance enforcement mechanisms to ensure that the district meets its attendance goals.

- **Recommendation 64 (p. 105): Repair or replace faulty safety and security equipment, and develop a plan to ensure equipment is maintained.** The security equipment replacement plan should include procedures to assess the operability of security equipment and a budget to phase in an equipment replacement schedule that keeps annual costs reasonable. The plan should allow for older or less effective technology to be reassigned to lower risk school areas that lack security devices.
- **Recommendation 65 (p. 107): Develop a comprehensive emergency disaster manual.** A comprehensive emergency disaster manual will help ensure that the district can successfully respond to all emergencies. The manual should include specific plans for handling different types of emergencies and the plans should be tested and modified, as needed, to ensure that everyone knows what to do in a real crisis.
- **Recommendation 66 (p. 108): Establish and enforce a district-wide badge system to improve district security.** The Personnel Department should issue and replace identification employee badges, and campus administrators should issue and replace student badges. In addition to implementing a photo-identification badge system for employees and students, each school should require visitors to wear badges identification badges, which will help school officials readily identify campus intruders.

DETAILED FINDINGS

SAFETY AND SECURITY ORGANIZATION (REC. 54)

VISD's safety and security services are not organized to ensure a single point of contact and responsibility. During the review team's on-site work, the district was unable to provide an organizational chart for this function. Based on interviews with employees in various departments, the review team developed and verified the organization chart depicted in **Exhibit 6-1**.

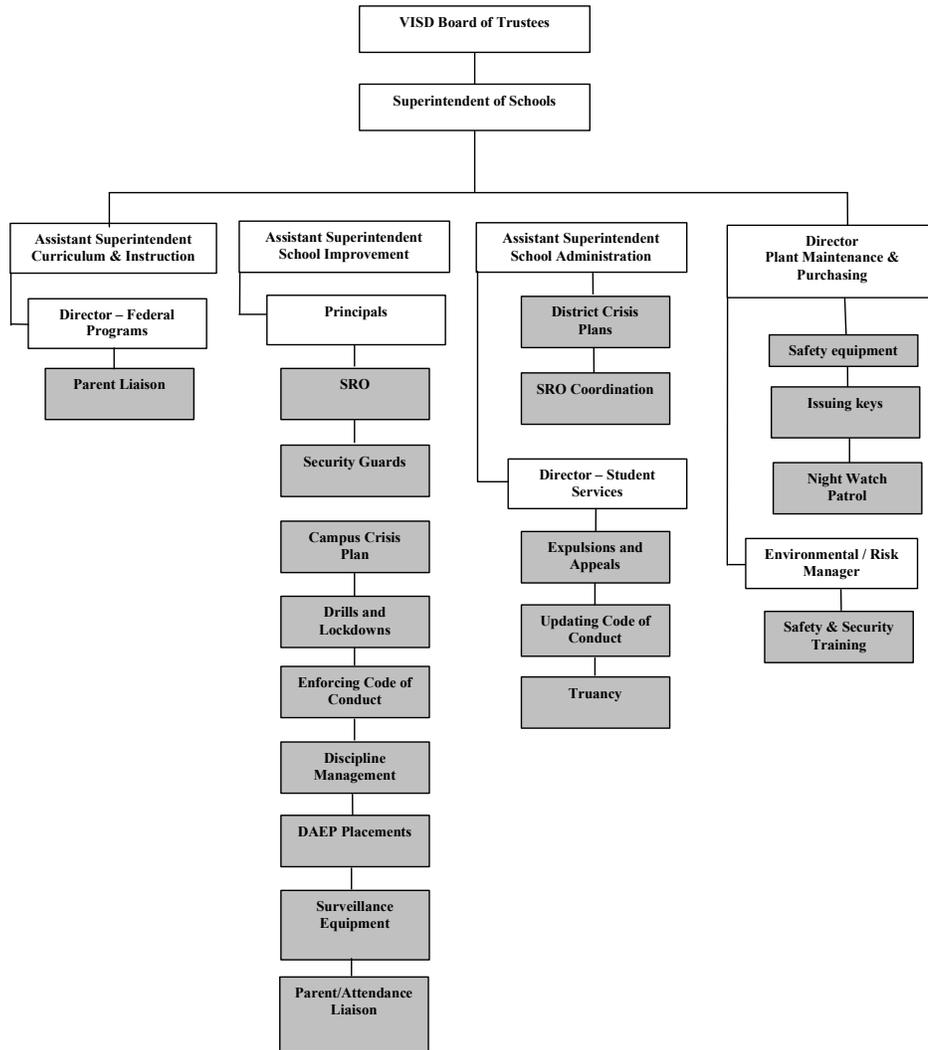
As noted in **Exhibit 6-1** and listed below, several individuals and departments are responsible for ensuring safety and security at VISD:

- The assistant superintendent of School Administration oversees the School Resource Officers Program and ensures that district-wide goals for safety and security are included in the District Improvement Plan (DIP);
- The Student Services Department oversees the Safe and Drug Free Schools entitlement, student appeals and expulsions process to ensure due process, the student handbook and code of conduct, service learning, and parent complaints;
- The principals and assistant principals at each campus are responsible for student discipline; conducting safety drills, and supervising the parent and attendance liaisons, and security guards;
- The Director of Federal Programs shares in the responsibilities of overseeing parent liaisons with the principals;
- The Mitchell Guidance Center is the district's alternative education school for students with behavioral problems;
- The Plant Maintenance Department oversees the maintenance of the safety equipment and facilities, night patrol, and issuing keys; and
- The Transportation Department is responsible for school bus safety and conducts safety seminars, driver training, and bus inspections.

This organizational structure reduces accountability, limits spending and financial reporting controls, creates communication problems, and reduces coordination among sections. Although several positions have important safety-related duties to perform, VISD does not have a single position that is responsible for planning, prioritizing, and directing district-wide safety initiatives.

With no one to prioritize district-wide initiatives, the different areas focus on meeting their own safety and security requirements without considering district-wide efficiencies. For example, district level staff stated that the district receives approximately \$100,000 from Safe and Drug Free federal funding, of which 20 percent is allocated for safety equipment acquisitions for the schools, and principals can purchase additional security and surveillance cameras using funds from their campus budgets. However, principals said that the district is responsible for purchasing all safety equipment for the schools. Another example is in how the district allocates security guards across schools. The district has 10 security guards on staff and all are assigned to the high school campuses. The other schools must hire

**EXHIBIT 6-1
SAFETY AND SECURITY SERVICES
2003-04**



SOURCE: Interviews with VISD Staff, April 2004.

contract guards if they believe they need security services.

Many districts designate one person as the coordinator for all district-wide planning, communications, and prioritization of resources. This central person is responsible for all safety and security planning, goals, budgeting, and management.

In Tyler ISD, the director of Secondary Education is responsible for safety and security for the district, while at Wichita Falls ISD, the chief financial officer has responsibility for district-wide safety and security. The Laredo ISD board moved the responsibility for occupational safety, emergency preparedness, and environmental compliance directly to the

superintendent to centralize and consolidate responsibility at the highest level.

VISD should centralize its safety and security functions under one district-level administrator. This administrator should oversee and coordinate the district’s safety planning and implementation process. The position would be responsible for coordinating all safety and security programs, monitor school security needs, and ensure crisis management plans are modified as needed.

**SAFETY AND SECURITY NEEDS
(REC. 55)**

VISD does not adequately meet the safety and security needs of the schools, as evidenced by the

high rate of disciplinary incidents and increase in criminal mischief. Various district and campus employees have safety and security responsibilities, yet some duties essential to the management of a successful safety and security program are not being performed. For example, the district is not accomplishing the following tasks: analyzing incidents by campus to equitably allocate security staff; addressing vandalism problems; supervising the security guards and the SROs; assessing the safety and security equipment and facility needs of all district schools and buildings; and monitoring and applying appropriate practices to handle disciplinary incidents and truancy.

Exhibit 6–2 shows the number of incidents in 2003–04 by school and the number of security guards and SROs at each of the schools. It shows the disparity in security services across schools.

The number of reported incidents has increased at all but one school from 2000–01 through 2003–04. Crain Middle School had the highest percentage increase in reported incidents at 52.8 percent.

Exhibit 6–3 lists each middle school and high school campus along with their respective increase or decrease in the number of incidents occurring between 2000–01 and 2003–04. During this period,

the district as a whole had a 10 percent increase in the number of reported incidents. It should be noted that incidents on the two high school campuses have been combined since 2002–03. Crain Middle School and Patti Welder Middle School rival the high school campuses in the number of incidents reported, yet the middle schools have fewer security guards.

Exhibit 6–4 shows the number of criminal mischief incidents reported by the Victoria County Sheriff’s Department. Criminal mischief incidents are reckless or negligent damages to tangible property through fire, explosives, or other dangerous means. There has been a 71 percent increase in the district’s reported criminal mischief incidents from 2001–02 through 2003–04.

Exhibit 6–5 summarizes results of staff, parent, and student survey responses to questions regarding safety and security. Every group surveyed said that vandalism, gangs, and drugs are major concerns in the district. Most groups said that school disturbances were frequent, and the students said they do not feel safe at school.

Many school districts comparable in size to VISD staff a chief of police and a security team to help ensure the safety of the students and district

**EXHIBIT 6-2
NUMBER OF SECURITY GUARDS AND RESOURCE OFFICERS PER SCHOOL
2003-04**

SCHOOL	INCIDENTS	SECURITY GUARDS	SCHOOL RESOURCE OFFICERS	TOTAL
Crain Middle School	2,235	0.5	1.0	1.5
Howell Middle School	885	0.5	1.0	1.5
Patti Welder Magnet Middle School	2,070	0.5	1.0	1.5
MHS - Stroman & Senior Campuses	4,812	10.0	2.0	12.0
Mitchell Guidance Center	1,142	2.0	1.0	3.0
Profit Academic Center	30	0.0	0.0	0.0
Total	11,174	13.5	6.0	19.5

SOURCE: VISD Information Technology, 2003–04 Incidents Reported as of April 2004 and Student Support Department, and interview notes for staffing as of April 2004.

**EXHIBIT 6-3
NUMBER OF INCIDENTS PER SCHOOL
2000-01 THROUGH 2003-04**

SCHOOL	2000-01	2001-02	2002-03	2003-04	INCREASE/ (DECREASE)	PERCENT CHANGE FROM 2000-01 TO 2003-04
Crain Middle School	1,463	1,820	1,813	2,235	772	52.8%
Howell Middle School	1,742	1,621	1,645	885	(857)	(49.2%)
Patti Welder Middle School	1,826	1,908	1,643	2,070	244	13.4%
MHS – Stroman & Senior Campuses	N/A	N/A	3,217	4,812*	752	18.5%*
Memorial High – Stroman Campus	1,817	1,789	N/A	N/A	N/A	N/A
Memorial High – Senior Campus	2,243	2,355	N/A	N/A	N/A	N/A
Mitchell Guidance Center	1,060	1,071	660	1,142	82	7.7%
Profit Academic Center	21	51	48	30	9	42.9%
Total	10,172	10,615	9,026	11,174	1,002	9.9%

SOURCE: VISD Incidents Reported to the Texas Education Agency, 2000–01 through 2002–03 and 2003–04 incidents reported as April 2004 not yet reported to the Texas Education Agency.

*The totals for the Stroman and Senior campuses for 2000–01 were used to determine the percent change.

EXHIBIT 6-4
VISD CRIMINAL MISCHIEF INCIDENTS
2001-02 THROUGH 2003-04

SCHOOL / DEPARTMENT	2001-02	2002-03	2003-04
Aloe Elementary			1
Chandler Elementary		1	1
Crain Middle School	3	9	9
Dudley Elementary	3	2	5
FW Gross Elementary	2	2	
Guadalupe Elementary	1		
Hopkins Elementary	1		
Mission Elementary		1	
Juan Linn Elementary			2
O'Connor Elementary			1
Shields Elementary	3		1
Rowland Elementary		1	
Smith Elementary		1	
Vickers Elementary		1	1
Williams Wood Elementary			1
Howell Middle School	1	2	6
Patti Welder Middle School	5	6	7
MHS - Stroman Campus	6	3	10
MHS - Senior Campus	12	16	14
Mitchell Guidance Ctr.		1	1
Transportation		1	2
Maintenance	1	1	1
Profit Academic Center			2
Total	38	48	65

SOURCE: Victoria County Sheriff's Department Criminal Mischief Reports, 2001-02 through 2003-04.

EXHIBIT 6-5
RESPONSES TO SCHOOL PERFORMANCE REVIEW SURVEY

GROUP	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
Students feel safe and secure at school.						
Principals	7.7%	79.5%	5.1%	7.7%	0.0%	0.0%
Parents	8.1%	51.7%	6.0%	22.7%	11.2%	0.0%
Students	5.3%	27.8%	15.5%	29.4%	21.4%	0.5%
School disturbances are infrequent.						
Principals	12.8%	59.0%	7.7%	20.5%	0.0%	0.0%
Teachers	5.5%	42.4%	3.8%	38.1%	10.2%	0.0%
Parents	8.1%	44.8%	10.6%	24.7%	11.8%	0.0%
Students	3.2%	23.0%	23.0%	29.9%	19.8%	1.15
Gangs are not a problem in the district.						
Administrators	2.6%	11.9%	19.6%	46.9%	19.1%	0.0%
Principals	0.0%	17.9%	12.8%	46.2%	23.1%	0.0%
Teachers	1.7%	14.4%	16.5%	46.2%	21.2%	0.0%
Parents	6.3%	18.7%	17.8%	34.5%	22.7%	0.0%
Students	4.8%	12.3%	11.8%	27.3%	43.3%	0.5%
Drugs are not a problem in the district.						
Administrators	0.5%	11.9%	16.5%	45.4%	25.8%	0.0%
Principals	0.0%	10.3%	2.6%	51.3%	35.9%	0.0%
Teachers	0.4%	3.8%	10.6%	55.9%	29.2%	0.0%
Parents	5.2%	18.4%	15.2%	34.5%	26.7%	0.0%
Students	5.9%	5.9%	8.6%	24.1%	54.5%	1.1%
Vandalism is not a problem in this district.						
Administrators	1.0%	16.5%	17.0%	47.4%	18.0%	0.0%
Principals	0.0%	12.8%	5.1%	59.0%	23.1%	0.0%
Teachers	0.9%	6.8%	7.6%	56.8%	28.0%	0.0%
Parents	4.0%	18.7%	21.6%	36.2%	19.5%	0.0%
Students	2.1%	4.3%	9.6%	35.3%	47.6%	1.1%

SOURCE: VISD Survey Results, April 2004.

NOTE: Totals may not add to 100 due to rounding.

employees. The main responsibilities of a chief of police are to supervise security guards, oversee SROs, and manage all functions pertaining to the safety and security of students, staff, and district facilities. Tyler ISD and Wichita Falls ISD, two of VISD's peer districts, have a chief of police on staff to oversee safety and security functions.

VISD should hire a chief of police to ensure that the security guards are properly trained; establish performance measures to monitor security performance; analyze incident rates by school to determine staffing allocations; address the district gang, drug and vandalism problems; assess the safety and security equipment and facility needs of all district schools and buildings; monitor and apply appropriate practices for handling disciplinary incidents and truancy issues; and participate in district-wide prevention and intervention strategy planning and implementation. The district should also hire three additional security guards. The cost of hiring a chief of police is estimated at \$60,552 annually [(\$56,276 salary x 1.028 variable benefits) + \$2,700 fixed benefits]. The three security guard positions will cost the district \$47,259 annually [(\$11,960 salary x 1.09139 variable benefits) + \$2,700 fixed benefits x 3 positions]. In 2004–05, this recommendation will cost the district a total of \$71,874 [(\$60,552 divided by 12 months x 8 months) + (\$47,259 divided by 12 months x 8 months)], assuming the positions will be filled in January 2005. The annual cost in subsequent years would be \$107,811 (\$60,552 + \$47,259).

LONG-RANGE SAFETY AND SECURITY PLANNING (REC. 56)

VISD does not have a comprehensive long-range safety and security plan to clearly outline a strategic direction for the district. The district's strategic plan and DIP include goals that are generally associated with elements of a safety and security-related long-range plan; however, neither plan includes implementation steps or performance data that ties the school's planned performance improvement initiatives to the budget. The absence of a long-range district safety and security plan has contributed to the district's fragmented approach to safety and security as observed by the review team.

The DIP includes goals pertaining to attendance, truancy, discipline management, and the alternative education program, but omits security elements that deal with the condition of the district's facilities and premises, and does not include plans for replacing safety equipment.

The district approaches safety and security as a site-based issue that is primarily managed through board

policy, the student code of conduct, and procedures included in the Emergency Disaster Manual. Although these documents provide detailed guidelines and information about district safety, security, student discipline, and emergency situations, they lack specific strategies and programs focused on prevention, intervention, and enforcement.

In addition, VISD and the VPD have not developed a formal comprehensive long-range plan for the SRO program. Although informal coordination exists between the organizations, the two entities operate independently and at times their priorities conflict. For example, staff at the Mitchell Guidance Center and the district's DAEP said that the SRO officer assigned to that campus is often called away to other campuses or to perform regular city police duties and may be off-campus a good portion of the day. Staff said that the Mitchell Guidance Center needs the continuous presence of SROs to control disciplinary incidents and ensure that disciplinary citations can be issued immediately to students committing zero tolerance offenses.

A comprehensive safety and security long-range plan clearly identifies roles and responsibilities and aligns expectations of administrators, teachers, and staff. It also helps organizations to identify conflicts in priorities and resources when coordinating activities with cooperating external organizations like the police or fire departments. A comprehensive long-range district-wide safety and security plan also promotes uniformity and consistency. It also provides a district framework for measuring performance and cost-efficiency. An effective benchmarking and evaluation process is critical to decision making regarding outsourcing or internally staffing security and related safety equipment maintenance functions.

The district has made a concerted effort to improve its safety and security processes with initiatives such as the SRO Leadership Program, the formation of a crisis management committee, and the acquisition of a crisis management simulation and assessment system. VISD should develop a long-range plan to enhance these current initiatives. The long-range plan would provide a comprehensive framework for policy decisions, resource commitments, coordination, consistent enforcement, and continuous performance measurement and improvement. A district safety and security committee, chaired by a district-assigned safety and security coordinator, should develop a long-range plan. The committee should assess the safety and security needs of each school/building; align and prioritize safety and security needs against identified risks; identify funding sources such as grants, shared service agreements, etc.; formulate objectives that

describe the desired outcomes and impact of prevention efforts; and develop strategies and specific tasks for accomplishing stated objectives.

SECURITY GUARD TRAINING (REC. 57)

VISD's security guards lack adequate training in preventing and managing disciplinary incidents.

Security guards said they lacked the skills to appropriately prevent or manage student violence and reduce security risks. They said that training in student search techniques; safe intervention in fights and conflicts; prevention of drug abuse, sale, and possession; and basic security policies and procedures is critical for effective job performance.

The assistant superintendent of School Administration said that a standard training session for the security force was one of the objectives in the district's strategic plan; however, he was not able to confirm when this training would occur.

SROs occasionally provide training to school district staff on topics including gang related issues. Although adequately trained in school safety techniques, the district does not use SROs to train district security guards.

Laredo ISD provides monthly staff development training for SROs and security guards. The training is school-related, but may also count as credit for state-required law enforcement in-service training hours.

VISD should establish an on-going staff development program to increase the skill level of its security guards. The district could use the School Resource Officers (SROs) to help train the security guards. Using SRO specialists as trainers would improve consistency, communication, and coordination between the two groups of security staff.

CAMPUS IMPROVEMENT PLANS (REC. 58)

VISD does not ensure all schools include violence prevention and intervention plans in their campus improvement plans (CIPs), as required by the Education Code (TEC). In 1999, the 76th Texas Legislature passed Senate Bill 1724, which requires each school to include goals and methods for violence prevention and intervention in its annual campus improvement plan (CIP).

The review team reviewed campus improvement plans from an elementary school and a high school. Only the high school CIP addressed safety and security. Its goal is to "decrease the number of violent acts, use of tobacco, alcohol, or other drugs by students by 10 percent." However, the goal does

not include specific strategies or a timeline for accomplishing this goal. It also lacks benchmarks against which to measure progress towards the 10 percent reduction goal.

The schools at Round Rock ISD and George West ISD have included goals for violence prevention and intervention in their annual CIPs. In addition to goals, the CIPs include strategies, action steps, assigned responsibility for meeting the goal, timelines, and benchmarks for measuring results. All VISD schools should incorporate goals addressing safety and security into their CIPs to be in compliance with state law and to let stakeholders know the schools are concerned about student safety.

Some Texas school districts, such as Killeen ISD, gather and analyze incident data to determine trends and create or modify prevention and intervention programs as needed. Moreover, Killeen ISD shares incident reports with board members, teachers, parents, and school administrators to obtain their input when developing prevention and intervention programs tailored to address the needs of specific schools.

VISD should ensure that all CIP's include violence prevention and intervention plans. Each school should develop campus-specific prevention and intervention strategies based on campus-specific incident reports. The plans should include benchmarks, measurable goals, and specific strategies.

CODE OF CONDUCT (REC. 59)

VISD's student code of conduct is poorly organized and lacks the clarity to ensure consistent application of consequences for student misbehavior. It allows principals significant latitude for subjectivity and results in inconsistent punishment for similar incidents. For example, the code of conduct does not adequately define "persistent" or "severe" misbehavior. The lack of clarity results in inconsistent or inappropriate DAEP referrals and different consequences for identical offense patterns.

The district revamped its code of conduct in June 2003 to improve the document and make it more user-friendly. The director of Student Services said that the committee responsible for revamping the code of conduct is planning to review it and make necessary modifications before printing the 2004-05 student handbooks. The director of Student Services also said the district is in the process of translating the code of conduct into Spanish. Fifty-three percent of the district's student population is Hispanic. According to district staff, many of the parents of these students are predominantly Spanish-speaking.

The district distributes the handbooks to students at the beginning of the school year and requires students and their parents to sign and return a form that acknowledges they understand the code of conduct. The code includes a general information section, followed by sections listing “serious offenses,” “consequences,” and offenses which may result in DAEP placement or expulsion. The handbook informs the reader that the principal or administrator is authorized to make disciplinary decisions and that more than one consequence may be used. **Exhibit 6-6** provides an example of “serious offenses” and related “consequences”.

The code of conduct lists some offenses that are subject to mandatory DAEP placement or discretionary expulsion. One such offense is “assault against a school district employee or volunteer.” District staff expressed concern that the code of conduct provides limited criteria to guide administrators in deciding when to use mandatory DAEP placement instead of discretionary expulsion. They also said that schools refer an excessive number of students with “severe persistent misbehavior” incidents to the DAEP.

The school performance review survey of teachers, administrators, parents, and students asked whether student discipline is fair and equitable. Only the principals, who are responsible for the application of the code, overwhelmingly agreed that the code was applied in a fair and equitable manner, with survey results showing almost 77 percent agreement. Administrators, parents, and students expressed agreement levels ranging from 28 to 47 percent. About 36 percent of the teachers who responded to the survey agreed that students receive fair and equitable discipline for misconduct. **Exhibit 6-7** shows the survey results for each group.

Cypress-Fairbanks ISD (CFISD) has a student code of conduct that matches student disciplinary offenses with consequences to ensure consistent application of discipline management practices. The code of conduct covers student rights, student responsibilities, the scope of the district’s authority, expectations for student conduct, and guidelines for assessing penalties. The code also includes detailed descriptions of levels of offenses, along with discipline options and disciplinary procedures for each category. These options and procedures include standards for behaviors, consequences for general misconduct, removal from the regular educational setting, and expulsion. **Exhibit 6-8** shows an example of the codes’ Level I and Level II violations and disciplinary options. The district also requires that students that have escalated to Level II take a discipline management class if they are assigned to in-school suspension. Each school has developed a discipline management class that meets the needs of its campus. A school must exhaust all disciplinary options before a student is referred to the district’s DAEP.

CFISD’s code of conduct includes a matrix that displays the district staff assigned to discipline management techniques and the notification method that will be used. **Exhibit 6-9** shows an example of this matrix.

VISD should develop a well-organized and clear student code of conduct that includes discipline options and disciplinary procedures for each category of misbehavior. The code should establish standards for behavior and set consequences for misconduct. It should clearly define specific offenses and the associated consequences.

**EXHIBIT 6-6
EXCERPT FROM THE VISD CODE OF CONDUCT**

SERIOUS OFFENSES
<ul style="list-style-type: none"> ▪ Absences, excessive; ▪ Cafeteria misconduct; ▪ Computer policies, violation of policies or agreements; ▪ Disobedience; ▪ Failure to participate in class; ▪ Horse playing; ▪ Sleeping in class; or ▪ Talking excessively.
CONSEQUENCES: IMPLEMENTED BY PRINCIPAL / ADMINISTRATOR. WHEN APPROPRIATE, MORE THAN ONE CONSEQUENCE MAY BE USED.
<ul style="list-style-type: none"> ▪ After school detention; ▪ Corporal punishment; ▪ Expelled __ days (discretionary); ▪ Expelled __ days (mandatory); ▪ ISS __ days; ▪ Referred by counselor; or ▪ Out-of-school suspension __ days.

SOURCE: VISD Student Code of Conduct, 2003-04.

**EXHIBIT 6-7
SURVEY RESPONSES
STUDENTS RECEIVE FAIR AND EQUITABLE DISCIPLINE FOR MISCONDUCT.**

GROUP	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
Administrators	9.3%	28.9%	21.1%	28.4%	12.4%
Principals	17.9%	59.0%	10.3%	10.3%	2.6%
Teachers	6.8%	29.7%	9.8%	32.6%	21.2%
Parents	6.9%	40.8%	19.3%	20.4%	12.6%
Students	4.8%	23.0%	24.6%	21.9%	25.7%

SOURCE:VISD Performance Review Survey Results, April 2004.
NOTE: Totals may not add to 100 percent due to rounding.

**EXHIBIT 6-8
CYPRESS-FAIRBANKS ISD
VIOLATION LEVELS I AND II**

VIOLATION	DISCIPLINARY OPTIONS OF WHICH ONE OR MORE MAY BE USED
Level I violation include infractions of classroom management procedures or campus rules that disrupt the educational process. Teachers and other staff members may keep a written record of the violations	
Level I violations may include such behaviors but not limited to: <ul style="list-style-type: none"> ▪ being tardy to class ▪ refusing to follow classroom rules participating in classroom activity, completing assigned work, etc.) ▪ running and/or making excessive noise in the halls, building, and / or classroom 	Level I – Disciplinary options of which one or more may be used: <ul style="list-style-type: none"> ▪ administrator / student conference ▪ behavior contract ▪ counselor / student conference ▪ parent contact; note, call, or conference ▪ teacher / student conference ▪ withdrawal of various student privileges
Level II violations include those infractions which are more serious in nature and interfere with the orderly operation of the classroom and/or school. Some of these infractions will result in a referral to an administrator. The disciplinary actions taken will depend on the offense, previous actions, and the seriousness of the violation. Certain Level II violations may be elevated to Level III violations based on the severity or context of the misconduct.	
Level II Violations include such behaviors as, but not limited to: <ul style="list-style-type: none"> ▪ altering school records, signing another person’s name on school document ▪ any repeat violation cited in the previous level ▪ cutting class or other scheduled activities ▪ throwing objects that can cause bodily injury or damage to property ▪ truancy 	Level II – Disciplinary options of which one or more may be used: <ul style="list-style-type: none"> ▪ administrator/counselor/teacher/student/parent conference ▪ assignment to peer mediation or conflict resolution classes ▪ campus or community service assignment ▪ In-school suspension – Discipline Management Class

SOURCE: Cypress-Fairbanks Student Code of Conduct, May 2004.

**EXHIBIT 6-9
CYPRESS-FAIRBANKS ISD
DISCIPLINE ASSIGNMENTS AND NOTIFICATION**

ASSIGNMENT	RECOMMENDED OR ASSIGNED BY	NOTIFICATION/DUE PROCESS	APPEAL TO
Detention Hall (DH)	Teacher or Asst. Principal	Parent/Student Conference	Principal or designee
Discipline Management Class (DMC)	Asst Principal	Parent/Student Conference	Principal or designee
Suspension	Asst Principal	Parent Letter/Conference	Principal or designee
DAEP (ALC/SOS)– 6 weeks placement	Asst Principal	Parent Letter/Hearing with Principal	None
DAEP (ALC/SAC/SOS) Placement of 9 weeks or longer	Asst Principal	Parent Letter/Hearing with Principal	Office of Student Services
Expulsion	Principal	Parent Letter /Hearing with Student Services	<ul style="list-style-type: none"> ▪ Board of trustees ▪ District court

SOURCE: Cypress-Fairbanks Student Code of Conduct, May 2004.

The district should also print and distribute the student code of conduct in Spanish.

DAEP HEARINGS OFFICER (REC. 60)
VISD does not have a district-wide hearings process and this has contributed to inappropriate DAEP

placements. The district lacks well-defined criteria for placing students at the Mitchell Guidance Center (MGC) and principals are sending an excessive number of students to the MGC under the category of “severe persistent misbehavior.” The assistant superintendent of School Administration said the

director of Student Services was responsible for a district-wide hearings process for DAEP placements up until 2001, when the position became vacant and the duties were restructured. The responsibilities for making DAEP placements were transferred to the school principals or their designees. The director of Student Services is only responsible for hearing expulsion cases.

There are two broad categories of offenses than can result in placement at the DAEP: zero tolerance or severe persistent misbehavior. Zero tolerance incidents include alcohol and substance abuse, assault, felonious activity, gang-related activity, threat, theft, and possession of a weapon. Students that commit these offenses are automatically placed at MGC or expelled. Severe persistent misbehavior is a more subjective category and results from repeated disruptive misbehavior and/or violation of the school code of conduct. Students that engage in severe persistent misbehavior may be suspended, expelled, or placed at the DAEP at the discretion of the school administrator. As noted in **Exhibit 6-10**, approximately 45 percent of DAEP placements are due to severe persistent misbehavior and 55 percent are due to zero tolerance. **Exhibit 6-10** shows the number and percentage of MGC placements and expulsions as of April 30, 2004.

Exhibit 6-11 shows the types of disciplinary incidents by campus as well as the totals. The Stroman Campus has the highest number of disciplinary incidents, followed by Patti Welder Middle School. Substance abuse and assaults are the most common in the zero tolerance category. An alarming number of these incidents occurred at Crain and Patti Welder Middle Schools.

Exhibit 6-12 shows the number of incidents for VISD and its peer districts for 2000-01 through 2002-03 as well as the percentage change for the past three years. VISD was consistently ranked the second highest in all three years, with Wichita Falls

having the highest number. The exhibit also compares VISD with the average of its peers. VISD experienced a 21 percent increase in the past three years.

Many school districts have a district-level DAEP hearings process. An example is Killeen ISD's Discipline Management Program, which is coordinated through the Student Services Department. Student Services is responsible for conducting student hearings for violations of the student code of conduct, monitoring and tracking student disciplinary actions, including referrals to alternative education programs, and expulsions. The director of Student Services serves as the district's hearing officer and conducts district-level due process hearings.

In addition to holding district-level hearings, some school districts have created teen peer courts that empanel high school students to hear cases involving student peers. North Forest ISD has created a peer court process that combines a high school Career and Technology Program with a Justice Court Program to provide discipline in an educational setting. The local justice of the peace provides judicial assistance and oversight of court proceedings for these student courts. Students are referred to the peer court for minor infractions, and the court determines disciplinary penalties within set limits. The court is not intended to replace criminal or juvenile court intervention for serious behavior.

VISD should reinstate a district-level hearings process for DAEP placements and ensure consistency and fairness. To implement this recommendation, the district should hire a coordinator level position to help the director of Student Services. The coordinator position will cost the district \$57,064 annually [(\$52,883 salary x 1.028 variable benefits) + \$2,700 fixed benefits]. In 2004-05, this recommendation will cost the district a total of \$38,043 (\$57,064 divided by 12 months x 8

**EXHIBIT 6-10
NUMBER AND PERCENT OF DAEP PLACEMENTS OR EXPULSIONS
VISD CAMPUSES 2003-04**

CAMPUS	ZERO TOLERANCE		SEVERE PERSISTENT MISBEHAVIOR	
	NUMBER	PERCENT OF TOTAL PLACEMENTS	NUMBER	PERCENT OF TOTAL PLACEMENTS
Crain MS	50	60.2	33	39.8
Howell MS	96	44.0	122	56.0
Patti Welder MS	6	75.0	2	25.0
MHS Stroman	71	74.0	25	26.0
MHS Senior	37	71.2	15	28.8
Profit Academic Center	73	50.3	72	49.7
Total	333	55.3	269	44.7

SOURCE: VISD assistant director of Mitchell Guidance Center, May 2004.

EXHIBIT 6-11
VISD STUDENT PLACEMENT IN DAEP: MITCHELL GUIDANCE CENTER BY
TYPES OF DISCIPLINARY INCIDENTS BY SCHOOL
2003-04

INCIDENTS	CRAIN MIDDLE SCHOOL	HOWELL MIDDLE SCHOOL	PATTI WELDER MIDDLE SCHOOL	MHS STROMAN CAMPUS	MHS SENIOR CAMPUS	PROFIT ACADEMIC CENTER	TOTAL	% OF TOTAL
Alcohol/ Tobacco	0	0	1	16	8	0	25	4.2%
Assault	28	11	14	18	5	0	76	12.6%
Drugs	34	14	27	54	31	6	166	27.6%
Felony	2	6	1	1	0	0	10	1.7%
Gang	0	0	5	0	0	0	5	0.8%
Weapon	3	4	11	5	2	0	25	4.2%
Sexual Assault	1	0	4	0	0	0	5	0.8%
Severe Persistent Misbehavior	25	15	71	122	33	2	268	44.5%
Threat	3	0	8	2	2	0	15	2.5%
Theft	0	2	3	0	2	0	7	1.2%
Totals	96	52	145	218	83	8	602	100.0%
% of Total	15.9%	8.6%	24.1%	36.3%	13.8%	1.3%	100.0%	

SOURCE: VISD assistant director of Mitchell Guidance Center, May 2004.

EXHIBIT 6-12
NUMBER AND PERCENT OF DAEP PLACEMENTS OR EXPULSIONS
VISD AND PEER DISTRICTS
2000-01 THROUGH 2002-03

SCHOOL DISTRICT	ENROLLMENT	PLACEMENTS OR EXPULSIONS*			% CHANGE
	2003-04	2000-01	2001-02	2002-03	
Tyler ISD	17,273	362	373	395	9.1%
Lamar ISD	17,724	280	315	389	38.9%
Bryan ISD	14,104	419	340	516	23.2%
Victoria ISD	14,316	490	534	593	21.0%
Wichita Falls ISD	15,035	669	681	742	10.9%
Peer Average	16,034	433	427	511	18.0%

SOURCE: Texas Education Agency, Public Education Information System (PEIMS), 2000-01 through 2002-03.
 NOTE: This exhibit does not include special education numbers and includes elementary students.

months), assuming the position is filled in January 2005.

IN-SCHOOL SUSPENSION (61)

VISD's in-school suspension programs are neither instructionally focused nor used effectively to change disruptive student behavior patterns. The number of suspensions for each secondary school campus is close to or exceeds the number of students enrolled, which demonstrates that the programs are not effective in changing student behavior.

Furthermore, at the Memorial High School campuses, paraprofessionals, instead of teachers, monitor the ISS centers. An assistant principal stated during an interview that teachers are supposed to provide homework and follow-up with the students while they are in the ISS center; however, many teachers do not follow through and students fall behind in their academic work during these periods.

Exhibit 6-13 shows the number of disciplinary placements by secondary schools for 2003-04. It

illustrates the high number of placements to ISS. The number of ISS placements reported for the two of the middle schools are higher than the student populations at these schools, and the number of placements at the high school was just less than its student population.

Exhibit 6-14 shows the number of ISS placements from 1999-2000 through 2003-04.

While a review of VISD records failed to pinpoint the exact reasons for VISD's high volume of disciplinary actions, potential contributors to the large number of ISS disciplinary actions could include the following:

- failure to analyze disciplinary pattern data;
- high turnover of school administrators;
- lack of adequate discipline/classroom management training or encouragement to appropriately apply behavior modification techniques;

**EXHIBIT 6-13
INCIDENTS REPORTED BY DISCIPLINARY ACTIONS
2003-04**

SCHOOL	ENROLLMENT	PLACEMENT TO DAEP	IN-SCHOOL SUSPENSION	OUT OF SCHOOL SUSPENSION
Crain Middle School	1,011	71	1,496	662
Howell Middle School	1,066	44	753	87
Patti Welder Magnet Middle School	1,056	123	1,263	680
Memorial High School	3,881	222	3,787	798
Mitchell Guidance Center School	102	0	393	701
Grand Total	7,116	460	7,692	2,928

SOURCE: VISD Incidents Reported to the Texas Education Agency, 2003-04 incidents reported as April 2004 not yet reported to TEA.

**EXHIBIT 6-14
IN-SCHOOL SUSPENSION INCIDENTS REPORTED
1999-2000 THROUGH 2003-04**

SCHOOL	2000	2001	2002	2003	2004	% CHANGE
Crain Middle School	1,314	1,381	1,625	1,505	1,496	13.9%
Howell Middle School	1,499	1,599	1,501	1,517	753	(49.8%)
Patti Welder Magnet Middle School	1,481	1,252	1,329	1,042	1,263	(14.7%)
Memorial High School	3,672	3,347	3,559	2,443	3,787	3.1%
Mitchell Guidance Center School	155	245	311	195	393	153.5%
Grand Total	8,121	7,824	8,325	6,702	7,692	(5.3%)

SOURCE: VISD Incidents Reported to the Texas Education Agency, 2000-01 through 2002-03 and 2003-04 incidents reported as April 2004 (not yet reported to the Texas Education Agency).

- limited interaction between teachers and administrators and student parents;
- use of the ISS program for reasons other than its stated intent and objective;
- lack of monitoring or measurement to determine the impact of the ISS program;
- need for additional initiatives to curb student discipline problems; and
- more accurate and complete reporting of discipline incidents.

Some school districts require students assigned to ISS to take behavioral management classes. These courses teach students conflict resolution strategies, anger management, and problem solving skills.

VISD should assign certified teachers to the high school ISS centers to ensure that students continue to learn while in ISS. In addition, campus administration should ensure teachers assign homework and follow-up with students while they are in ISS. The district also should incorporate a behavior management component into its ISS program to reduce the number of placements. To implement this recommendation, the district should pay stipends to teachers who volunteer to staff the ISS centers during their off periods. Eight teachers, four from each school, would work two hours per day and receive a \$1,000 stipend per year at an annual cost to the district of \$8,224 including variable benefits (\$8,000 salary x 1.028 variable benefits).

INCIDENT REPORTS (REC. 62)

The district does not provide adequate incident reports to the board, community, and parents.

The incident reports include a district-level summary page totaling all incidents by type of action taken to address the incident. The incident report packet includes reports for each school that list all the incidents by type, grade, and ethnicity as well as the actions taken by the school. The school- reports do not include prior year data and, therefore, cannot show historical trends, disallowing readers to assess the school's performance. The district-level report does show prior year data; however, it does not show this information by subcategories such as elementary, middle, and high school, nor does it show the incident types. Without historical data and data listed by subcategories, school and district administrators cannot evaluate and monitor the type and frequency of incidents.

The TEC requires Texas school boards to provide an annual report to parents and the community that includes a statement of the number, rate, and type of violent or criminal incident that occurred on each district campus. The report must include information concerning school violence prevention and intervention strategies, and findings from the evaluations conducted under the Safe and Drug-Free Schools and Communities Act of 1994. VISD's annual community and parent disciplinary incident report does not include prior year data or the total the number of incidents by campus. It only provides

data on the high school campuses, middle schools, Mitchell Guidance Center, and Profit Academic Center; it does not show the incidents for elementary schools. These reports are inadequate for a meaningful analysis of disciplinary trends and patterns.

Some Texas school districts, such as Killeen ISD, gather and analyze incident data to determine trends and create or modify prevention and intervention programs as needed. Moreover, Killeen ISD shares incident reports with board members, teachers, parents, and school administrators to obtain their input when developing prevention and intervention programs tailored to address the needs of specific schools.

VISD should develop comprehensive disciplinary incident reports at least once a year. These management reports should be distributed and discussed with board members, school administrators, teachers, parents, and site-based committees. This process would give stakeholders an opportunity to share ideas for additional prevention and intervention efforts.

PARENT LIAISONS (REC. 63)

A 2003–04 reduction in parent liaison positions and inefficient administrative processes are impeding the district's ability to maintain an effective parent and student intervention program aimed at reducing truancy. In 2003–04, the three middle schools parent liaison positions were eliminated due to a reduction in district funds. To help make up for this loss, the middle school principals asked the district's two attendance officers to help with home visits to investigate chronic absenteeism.

The district currently employs a total of 20 staff to address truancy: 16 parent liaisons, two attendance liaisons, and two attendance officers, usually referred to as truancy officers in other schools. The parent liaisons are certified teachers or social workers whose primary job responsibilities include monitoring student attendance, conducting home visits, and holding parent training seminars and workshops. The two attendance liaisons assist the high school parent liaisons, with one designated to each campus. The attendance officers are district level employees whose responsibilities include working with campus parent liaisons and the courts after the student has violated a statutory warning to attend school on a regular basis. They investigate each case submitted to the Office of Student Attendance by conducting home visits and investigating each compulsory school attendance violation case.

Since 1999–2000, VISD schools' attendance rates have declined slightly for all secondary schools and

eight of the fifteen elementary schools. Attendance rates are the lowest at Memorial High School, Mitchell Guidance Center, JCAA, and the Profit Academic Center, ranging from 68.1 to 91.2 percent. Most of the elementary schools have attendance rates well above 95 percent, showing that the district is doing a better job in addressing attendance at these schools. Patti Welder Middle School is at 94.2 percent, while the other two middle schools are slightly above 95 percent. **Exhibit 6–15** shows the attendance rates for VISD by campus.

VISD's overall student attendance rate for 1997–98 through 2001–02 is below the state, region, and peer averages (**Exhibit 6–16**).

Exhibit 6–17 shows the number of truancy court case filings per campus from 2000–01 through 2003–04. As suggested by this table, the attendance officer's additional duties at the middle schools have affected their ability to file court cases for truancy. The number of truancy court filings decreased significantly in 2003–04. The 2003–04 filings were 379 as of April 21, 2004, approximately nine months through the ten months of the school year. Subsequently, an attendance officer informed the review team that as of May 28, 2004, the total filings for the year total 475, which is 38.4 percent less than the previous year's 771.

A second factor impeding the district's ability to effectively address truancy is the use of a manual process for tracking attendance. The district's methods for recording attendance and absences and for notifying parents of student absences are all manual and inefficient. The liaisons and attendance officers must manually reconcile various attendance documents and reports to identify those absences that require them to initiate legal notifications and legal summons. The manual processes require excessive verification and cross-checking to ensure that absence notification warning letters and truancy summons are not inadvertently sent to students with excused absences.

To automate the attendance taking process, VISD planned to implement a web-based attendance software by fall 2004. The software will help each school create more accurate attendance and will provide an integrated electronic method to help the district track and monitor student attendance. Daily classroom attendance will be automatically distributed to the district student information system. The only setback to this system is that approximately 50 percent of the teachers do not have a computer. According to district staff, the attendance taking process cannot be fully automated due to the lack of adequate computer hardware. Approximately 490 teachers will have to continue using the manual

**EXHIBIT 6-15
VICTORIA ISD ATTENDANCE RATES
1999-2000 THROUGH 2003-04**

CAMPUS NAME	1999-2000	2000-01	2001-02	2002-03	2003-04	% CHANGE FROM 1999-2000 TO 2003-04
ELEMENTARY SCHOOLS						
Aloe Elementary	96.7%	96.0%	95.9%	95.9%	95.7%	(1.0%)
CO Chandler Elementary	0.0%	96.9%	96.8%	97.0%	96.7%	N/A
DeLeon Elementary	97.1%	96.7%	96.2%	96.2%	96.2%	(0.9%)
Dudley Elementary	96.7%	96.4%	96.4%	96.6%	96.3%	(0.4%)
FW Gross Elementary	97.6%	97.4%	97.1%	96.8%	98.1%	0.5%
Guadalupe Elementary	96.5%	96.2%	95.5%	95.5%	96.8%	0.3%
Hopkins Elementary	96.4%	96.0%	95.7%	96.2%	96.0%	(0.4%)
Juan Linn Elementary	97.3%	96.9%	97.1%	96.6%	97.0%	(0.3%)
Mission Valley Elementary	97.2%	97.2%	96.7%	97.2%	97.3%	0.1%
O'Conner Elementary	96.3%	95.8%	95.9%	96.3%	96.2%	(0.1%)
Rowland Elementary	95.2%	95.2%	95.1%	94.9%	95.3%	0.1%
Shields Elementary	96.2%	95.5%	95.3%	95.2%	95.2%	(1.0%)
Smith Elementary	96.4%	96.1%	96.1%	96.1%	96.6%	0.2%
Vickers Elementary	96.7%	96.6%	96.5%	96.6%	96.6%	(0.1%)
William Wood Elementary	97.0%	96.9%	96.4%	96.5%	97.0%	0.0%
MIDDLE SCHOOLS						
Crain Middle	96.3%	96.1%	96.0%	95.6%	95.2%	(1.2%)
Howell Middle	96.0%	95.6%	95.7%	95.6%	95.2%	(0.8%)
Patti Welder Middle	94.9%	94.3%	94.1%	94.7%	94.2%	(0.7%)
HIGH SCHOOLS						
Memorial High School	92.7%	91.8%	91.7%	92.9%	91.2%	(1.6%)
ALTERNATIVE EDUCATION CENTERS						
Coletto Creek School	99.6%	98.0%	98.8%	98.5%	98.9%	(0.7%)
Juvenile Center for Academic Achievement	0.0%	87.9%	68.9%	80.1%	68.1%	N/A
Juvenile Detention Center	99.6%	99.5%	99.5%	99.5%	99.5%	(0.1%)
Mitchell Guidance Center	74.4%	75.1%	71.0%	76.1%	74.9%	0.7%
Profit Academic Center	83.2%	82.0%	81.2%	83.4%	82.8%	(0.5%)

SOURCE: VISD Information Technology Department for 1999-2000 through 2003-04 as of April 2004.

**EXHIBIT 6-16
VICTORIA ISD AND PEERS ATTENDANCE RATES
1997-98 THROUGH 2001-02**

DISTRICT	1997-98	1998-99	1999-2000	2000-01	2001-02	% CHANGE
Bryan ISD	94.9	95.0	94.8	95.2	95.2	0.3%
Lamar ISD	94.8	95.3	95.9	95.6	96.0	1.3%
Tyler ISD	95.8	96.1	96.0	96.0	95.9	0.1%
Victoria ISD	94.9	94.8	95.1	94.5	94.3	(0.6%)
Wichita ISD	95.9	95.8	95.9	95.5	95.9	0.0%
Peer Average	95.4	95.6	95.7	95.6	95.8	0.4%
Region 3	95.5	95.5	95.9	95.5	95.5	0.0%
State	95.3	95.4	95.6	95.5	95.6	0.3%

SOURCE: Texas Education Agency AEIS, 1998-99 through 2002-03

process, which, in turn, undermines the improvements offered by the new system.

Austin ISD (AISD) is using an Absent Student Assistance Program (ASAP) to help reduce unexcused absences and truancy cases. The program is a community-based collaborative effort involving Austin, Del Valle, and Pflugerville Independent School Districts and the Travis County constables. Its purpose is to improve student attendance by notifying parents when their children are absent, keep children in school, and prevent their

involvement in the juvenile justice system. The process involves the following steps:

- Schools immediately refer students who are absent without an excuse to the county constables.
- The county constable telephones the parents upon the student's first absence.
- On subsequent absences, constables may visit the student's home with the district representative and investigate the reason for the absence.

EXHIBIT 6-17
TRUANCY COURT CASE FILINGS
2000-01 THROUGH 2003-04

CAMPUS NAME	2000-01	2001-02	2002-03	2003-04 *	INCREASE / (DECREASE)	% CHANGE FROM 2000-01 TO 2003-04
ELEMENTARY SCHOOLS						
Aloe Elementary	5	8	6	4	(1)	(20.0%)
CO Chandler Elementary	2	5	3	2	0	0.0%
DeLeon Elementary	2	0	2	0	(2)	(100.0%)
Dudley Elementary	12	10	16	4	(8)	(66.7%)
FW Gross Elementary	8	7	27	12	4	50.0%
Guadalupe Elementary	0	0	2	0	0	0.0%
Hopkins Elementary	1	6	15	6	5	500.0%
Juan Linn Elementary	9	12	14	12	3	33.3%
Mission Valley Elementary	7	5	8	4	(3)	(42.9%)
O'Conner Elementary	4	17	44	17	13	325.0%
Rowland Elementary	17	21	23	9	(8)	(47.1%)
Shields Elementary	3	10	17	11	8	266.7%
Smith Elementary	7	7	7	2	(5)	(71.4%)
Vickers Elementary	4	1	4	3	(1)	(25.0%)
William Wood Elementary	3	2	4	1	(2)	(66.7%)
MIDDLE SCHOOLS						
Crain Middle	48	38	49	19	(29)	(60.4%)
Howell Middle	22	21	17	11	(11)	(50.0%)
Patti Welder Middle	48	29	52	32	(16)	(33.3%)
HIGH SCHOOLS						
MHS – Stroman Campus	232	194	149	98	(134)	(57.8%)
MHS – Senior Campus	112	156	206	76	(36)	(32.1%)
ALTERNATIVE EDUCATION CENTERS						
Mitchell Guidance Center	0	30	61	31	31	N/A
Profit Academic	29	32	42	25	(4)	(13.8%)
Juvenile CAA	0	0	3	0	0	N/A
Total	575	611	771	379	(196)	(34.0%)

SOURCE: VISD Student Services Department.
 NOTE: 2003-04 is as of May 28, 2004.

- Each constable's deputy receives four hours of training on the actions required under the Texas Education Code to deal with commonly encountered family problems.

ASAP has improved school attendance rates in Travis County school districts, and these districts have received additional state funding by increasing their average daily attendance (ADA). Through an inter-local agreement with Travis County, AISD offsets 50 percent of the costs of operating ASAP in its schools.

VISD should hire three parent liaisons, one for each of the middle schools, and allow the attendance officers to focus on their primary duties. The district should also ensure that all classrooms have computer access to enable teachers to record attendance online using the district's new web-based attendance software. The district should ensure that the attendance reports generated by the new system are adequate enough to accurately identify students out of compliance with compulsory school attendance

laws. It should also establish a plan to raise the secondary school attendance rates to a minimum of 95.5 percent.

Assuming VISD is able to increase the attendance in its middle and high schools that are not yet at 95.5 percent, the district could return 236 students per day to the classroom, as shown in **Exhibit 6-18**.

The increase in ADA state aid revenue would provide the district with an additional \$445,096 each year (\$1,886 x 236 students) beginning in 2005-06. The extra revenue for the district would be at a cost to the state treasury.

Hiring three full-time parent liaisons for the middle schools will cost the district a total of \$139,037 [(\$42,457 average salary for one parent liaison x 1.028 variable benefits) + \$2,700 x 3 positions]. The annual net savings for the district beginning in 2005-06 totals \$306,059 (\$445,096 ADA funding - \$139,037 for three parent liaison positions). Assuming the district hires the three parent liaisons in January

**EXHIBIT 6-18
CALCULATION FOR INCREASE IN AVERAGE DAILY ATTENDANCE**

SCHOOLS	ENROLLMENT	ATTENDANCE RATES	AVERAGE DAILY ATTENDANCE	PROPOSED ATTENDANCE RATES	AVERAGE DAILY ATTENDANCE AT 95.5 PERCENT	AVERAGE DAILY ATTENDANCE INCREASE
Rowland Elementary	497	95.3%	474	95.5%	475	1
Shields Elementary	646	95.2%	615	95.5%	617	2
Crain Middle	1,011	95.2%	962	95.5%	966	4
Howell Middle	1,066	95.2%	1,015	95.5%	1,018	3
Patti Welder MS	1,056	94.2%	995	95.5%	1,008	13
Memorial High School	3,881	91.2%	3,539	95.5%	3,706	167
JCAA	16	68.1%	11	95.5%	15	4
Mitchell Guidance Center	102	74.9%	76	95.5%	97	21
Profit Academic	167	82.8%	138	95.5%	159	21
Total Enrollment	8,442		7,825		8,061	236

SOURCE: VISD, Information Technology Department, Performance Review Team, May 2004.

2005, there will be a first year cost of \$92,691 (\$139,037/12 x 8).

UNSAFE FACILITIES (REC. 64)

VISD does not make facility, grounds, and system improvements necessary to make its schools safe and secure. This issue undermines the district’s crisis planning and prevention efforts. Security equipment is not working at all of the schools, leaving students and teachers vulnerable during emergency conditions.

Facility assessment reports conducted by the Plant Maintenance Department show that many schools lack adequate security equipment (**Exhibit 6-19**). The assessments entailed a walk through of each building and its premises to determine the maintenance requirements of each facility. The maintenance staff used a checklist to mark needed repairs, replacements or additional equipment or fixtures. **Exhibit 6-19** shows the results of the assessment pertaining to safety equipment and external lighting. Security alarms, lighting, and PA systems were on the checklist, although surveillance cameras were omitted from the list. The letters in the building or location column is the code that the district assigns to each building on a campus in lieu of providing it a building name.

School personnel expressed serious concerns about the poor condition and lack of security alarms, surveillance cameras, and external lighting. As noted earlier, criminal mischief has increased at the district. School staff believes that security equipment and adequate lighting, both internally and externally, have helped reduce the number of crime-related incidents, but they can be effective only if they are maintained properly or replaced when necessary.

Exhibit 6-20 shows the district’s actual expenditures per student for safety and security from 1997-98

through 2002–03. The district has not made any capital asset acquisitions in the past six years, nor did it budget for capital expenditures for 2003–04. Although the table below does not show capital expenditures, the director of Support Services informed the review team that \$20,000 from the Safe and Drug Free School funding is allocated to security equipment. She stated that this year’s money was used for equipment purchases for the middle schools, and the previous year’s funds purchased cameras for the Stroman campus.

Exhibit 6-21 compares VISD with its peer districts. Tyler ISD and Bryan ISD show expenditures for capital assets.

Dallas ISD uses a standard inspection checklist to evaluate and improve the status of physical security at district schools and facilities. A team of security staff employees have been selected and trained in police crime prevention and physical security methods to conduct physical security assessments. This effort strengthens the safety environment of schools and facilities.

VISD should determine the most critical facility needs in terms of safety and security and develop a timeline to address these needs. Once the district addresses the critical needs, it should establish a formal Safety Equipment Replacement Plan to complete the remaining items. The plan should include a general policy statement; replacement cycle based on the average useful life of each major type of equipment; procedures for reviewing the replacement policy; estimated annual funding requirements; and standard specifications for equipment purchases.

The fiscal impact for this recommendation recognizes that the district has not made sufficient acquisitions of safety equipment over the last six

EXHIBIT 6-19
SAFETY EQUIPMENT AND LIGHTING ASSESSMENT
DECEMBER 2002

INTERNAL ELECTRIC/SAFETY EQUIPMENT	BUILDING/LOCATION CODES	NUMBER PER SITE
Aloe Elementary	E	3
Central Supply	A	1
Career Development Ctr.	A	4
Chandler Elementary	N/A	0
Crain Middle School	A, B, C, F, G, H, I, J, K	28
Deleon Elementary	A, B, C, D	12
Dudley Elementary	D	4
Family Connections	A	4
FW Gross Elementary	A, B, C	12
Guadalupe Elementary	C	2
Hopkins Elementary	C, D, E	8
Howell Elementary	A, B	6
Juan Linn Elementary	C, D, E	7
Maintenance Department	A	4
MHS – Senior	A, B, C, D, E, F, G, H, I, K, L, M, N	38
MHS – Stroman	A, B, C, D, E, F, G, H, I	27
Mission Valley Elementary	A, B, C, D, E, F, G, H, I	36
Mitchell Guidance Center	A, B, C, D	16
O'Connor Elementary	A, B, C, D	10
Patti Welder Middle School	D, E, F	6
Rowland Elementary	A, B, C, D, E	14
Shields Elementary	A, B, C, D, E	13
Smith Elementary	A, B, C, D, E	7
Transportation	Office, Storage Way Bay	9
Vickers Elementary	D	4
William Wood	C, D	5
Total		280
EXTERNAL ELECTRIC / BUILDING AND AREA LIGHTING	BUILDINGS	NUMBER PER SITE
Aloe Elementary	E	1
Chandler Elementary	N/A	0
Crain Middle School	A, B, F, G, H, I, J, K	8
Dudley Elementary	A, B, C, D	4
FW Gross Elementary	A, C, D	4
Guadalupe Elementary	C	1
Hopkins Elementary	B, C, D, E	4
Juan Linn Elementary	A, B, C	3
Maintenance Department	A	1
MHS – Senior	A, B, C, D, E, F, G, H, I, K, L, N	15
MHS – Stroman	A, B, C, D, F, G, H, I	8
Mission Valley Elementary	A, B, C, D, E, F, H, I	14
Mitchell Guidance Center	A, B, C, D	4
INTERNAL ELECTRIC/SAFETY EQUIPMENT	BUILDING/ LOCATION CODES	NUMBER PER SITE
O'Connor Elementary	B, D	2
Patti Welder Middle School	F	2
Rowland Elementary	E	1
Shields Elementary	A, B, E	3
Smith Elementary	B, C, D, E	4
Transportation Department	Office, Storage Way Bay	3
Vickers Elementary	D	1
William Wood Elementary	A, B, C, D	4
Total		87

SOURCE: VISD Plant Maintenance Department Assessment Reports, December 2002.

years. It should budget \$204,961 per year until it has purchased all the equipment identified as critical. Thereafter, expenditures should be adjusted to reflect replacement needs as set out in the formal life-cycle replacement plan. This fiscal impact includes the

purchase of exterior surveillance cameras, sound alarms, and motion detectors. The district should also purchase interior surveillance cameras for Crain Middle School, Senior campus, Stroman campus,

**EXHIBIT 6-20
VISD EXPENDITURES PER STUDENT FOR SAFETY AND SECURITY
1997-98 THROUGH 2002-03**

EXPENDITURE CATEGORIES	1997-98	1998-99	1999-2000	2000-01	2001-02	2002-03
Salaries	\$3.47	\$6.18	\$6.81	\$6.94	\$7.51	\$9.03
Contracted Services	21.59	21.24	26.42	28.28	31.27	31.41
General Supplies and Material	0.22	0	2.40	2.54	1.13	1.07
Other Operating Equipment	0	0	0	0.35	0.47	0
Capital Outlay	0	0	0	0	0	0
Total	\$25.28	\$27.42	\$35.63	\$38.11	\$40.39	\$41.51

SOURCE: Texas Education Agency, PEIMS, 1997-98 through 2002-03.

**EXHIBIT 6-21
VISD AND DISTRICT PEERS
SAFETY AND SECURITY EXPENDITURE COMPARISON WITH PEERS, 2002-03**

EXPENDITURE CATEGORY	BRYAN	LAMAR	TYLER	VICTORIA	WICHITA FALLS
Salaries	\$79,215	\$370,298	\$329,141	\$130,335	\$219,739
Contracted Services	252,307	491,414	268,449	453,537	75,942
General Supplies and Equipment	0	19,838	27,210	15,508	5,877
Other Operating Costs	6,196	2,090	9,844	0	2,676
Capital Outlay	38,115	0	13,760	0	0
Total Expenditures	\$375,833	\$883,640	\$648,404	\$599,380	\$304,234
Salaries	21.1%	41.9%	50.8%	21.7%	72.2%
Contracted Services	67.1%	55.6%	41.4%	75.7%	25.0%
General Supplies and Equipment	0.0%	2.2%	4.2%	2.6%	1.9%
Other Operating Costs	1.6%	0.2%	1.5%	0.0%	0.9%
Capital Outlay	10.1%	0.0%	2.1%	0.0%	0.0%
Enrollment	13,927	16,923	17,031	14,438	14,951
Expenditures per Student	\$26.99	\$52.22	\$38.07	\$41.51	\$20.35

SOURCE: Texas Education Agency, PEIMS, 2002-03.

Mitchell Guidance Center, and the administration building, which includes the Profit Academic Center.

Over the next five years, exterior surveillance cameras should be installed in strategic locations around the external premises of each facility to cover the buildings, parking lots, and playgrounds, for a total of \$811,575. Interior surveillance cameras should be mounted in hallways and isolated areas to ensure that administration and SROs are able to monitor those high risk areas, and will cost a total of \$175,000 over five years. Both types of surveillance cameras include digital recorders with network capability. This will allow the district SROs and administrators the option of onsite or remote Internet-based monitoring.

This fiscal impact also includes sound alarms for each exterior entry way and motion detectors for campus administration offices and computer labs. This pricing would provide only a non-monitored sound alarm system. The total cost for sound alarms and motion detectors is \$38,230.

The total cost for safety equipment over the next five years is \$1,024,805 (\$811,575 for exterior surveillance cameras + \$175,000 for interior surveillance cameras

+ \$38,230 for sound alarms and motion detectors). In order to implement this recommendation, the district will need to budget \$204,961 annually for the next five years for safety equipment (\$1,024,805 total cost of equipment / 5 years).

EMERGENCY DISASTER MANUAL (REC. 65)

The district's Emergency Disaster Manual is outdated and is missing critical elements. The Emergency Disaster Manual was last revised in April 1998. The contact sheet still lists the names of former district employees, including the previous superintendent. In addition, VISD does not regularly perform emergency drills other than fire drills.

Compared to an emergency disaster planning guide developed by the Texas School Safety Center, the district's plan does not address the following emergency categories: armed attack by student or intruder; drive-by shooting; drug overdose; fights; illegal drug, alcohol, or tobacco possession, use, or discipline; and missing or runaway student. The Texas School Safety Center developed the Planning Manual For Safe Schools to assist Texas school districts create crisis management plans.

The center also provides services in crisis management training and workshops to all Texas school districts.

VISD has developed a *Crisis Management Plan* flipchart that provides district and school administrators with an outline of things to do in various emergency situations ranging from natural or operational disasters to assault and death on campus. Although this flip chart is a handy tool when an emergency arises, it is not a substitute for a comprehensive crisis management manual or regular emergency drills.

VISD should develop a comprehensive Emergency Disaster Manual to be better prepared to deal with any crisis that might occur. The manual should include specific plans for dealing with different types of emergencies. The district should test the crisis plans and modify the manual as needed. Testing the plans will help the district identify gaps in training and needed equipment.

IDENTIFICATION BADGES (REC. 66)

VISD schools do not have an effective means to identify campus visitors, students, and employees. The district does not require its students and staff to wear identification badges and not all schools enforce a district-wide policy that requires parents and all other visitors to sign-in at the main office. SROs and security guards stated that it is difficult to distinguish campus students from other non-student adolescents that are visiting the campus.

The review team visited the two high school campuses, two middle schools, and two elementary schools. Not one of these schools required the review team to sign-in. The review team walked the hallways of these campuses without any inquiry regarding their identity or purpose for being in the building. Requiring all visitors to sign-in ensures that the schools always have a record of who is on campus. This is especially critical if the school needs to evacuate during an emergency.

Also, SROs, security guards, and school administrators said that national gangs are recruiting at VISD schools. Requiring all students and visitors to wear identification badges is one way to help reduce this activity.

Many school districts have implemented photo-identification badge systems for employees. For example, Killeen Independent School District adopted a badge system in 1998 for its employees.

Cedar Hill ISD has student and employee identification badges to help ensure proper access to and control of its school facilities. Police officers and administrators can immediately stop any person without a badge or with a badge that suggests the person is not authorized in an area. The police officers said requiring badges helps deter inappropriate student behavior, provides an opportunity to challenge trespassers, and reduces the use of false names when visitors are confronted by an officer.

VISD should implement a badge system for employees and students and require visitors to wear temporary badges. Each school's visitor badge should be noticeably different in style, be sequentially numbered, and created in such a manner that it cannot be easily duplicated. All visitors should provide identification, sign a log noting the badge number, and wear the temporary authorization badge while attending to business within the school. Visitor badges should be accounted for daily.

The major expense of the badge system is the initial purchase of camera systems including digital cameras, printers, and software, at an approximate cost of \$4,000. The district will need six camera systems, one for the Human Resources Department to process staff badges, and five for the high school and middle school campuses to process student badges. The total cost for six camera systems is \$24,000 (\$4,000 per camera system x 6 camera systems). The initial total cost for supplies is \$25,500 [\$1.50 per badge x 17,000 (14,500 students + 2,300 employees + 200 visitor badges).] The total one-time cost is \$49,500 (\$24,000 cameras + \$25,500 supplies).

The district will need to purchase additional supplies each school year to create badges for new staff and students. This fiscal impact assumes that the district will need supplies for approximately 2,000 new badges (1,000 new students + 500 replacements + 500 new employees). The annual total for supplies beginning in 2005–06 is estimated at \$3,000 (\$1.50 per badge x 2,000 badges).

For background information on Safety and Security, see p. 217 in the General Information section of the appendices.

FISCAL IMPACT

RECOMMENDATION		2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
CHAPTER 6: SAFETY AND SECURITY								
54.	Consolidate all safety and security functions under one district-level administrator.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
55.	Hire a chief of police and additional security guards.	(\$71,874)	(\$107,811)	(\$107,811)	(\$107,811)	(\$107,811)	(\$503,118)	\$0
56.	Develop a long-range, comprehensive safety and security plan, and ensure that the plan includes performance measures.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
57.	Provide ongoing in-service training for security guards.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
58.	Ensure that all schools address violence prevention and intervention in their campus improvement plans.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
59.	Modify the district's student code of conduct to align student disciplinary offenses with consequences to ensure consistent application of discipline management practices, and publish a Spanish version of the code.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
60.	Reinstate a district-level hearings officer for student code of conduct violations involving disciplinary alternative education program (DAEP) placements to ensure consistency and due process.	(\$38,043)	(\$57,064)	(\$57,064)	(\$57,064)	(\$57,064)	(\$266,299)	\$0
61.	Assign certified teachers to the high school in-school suspension (ISS) centers and increase the instructional focus of this program.	(\$8,224)	(\$8,224)	(\$8,224)	(\$8,224)	(\$8,224)	(\$41,120)	\$0
62.	Prepare comprehensive reports of disciplinary incidents and develop additional prevention and intervention programs to improve student behavior.	\$0	\$0	\$0	\$0	\$0	\$0	\$0

FISCAL IMPACT (CONTINUED)

RECOMMENDATION	2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
CHAPTER 6: SAFETY AND SECURITY							
63. Hire parent liaisons for the middle schools and automate administrative processes to help raise the district's attendance to a minimum of 95.5 percent at all secondary schools.	\$0	\$445,096	\$445,096	\$445,096	\$445,096	\$1,780,384	\$0
	(\$92,691)	(\$139,037)	(\$139,037)	(\$139,037)	(\$139,037)	(\$648,839)	\$0
64. Repair or replace faulty safety and security equipment, and develop a plan to ensure equipment is maintained.	(\$204,961)	(\$204,961)	(\$204,961)	(\$204,961)	(\$204,961)	(\$1,024,805)	\$0
65. Develop a comprehensive emergency disaster manual.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
66. Establish and enforce a districtwide badge system to improve security.	\$0	(\$3,000)	(\$3,000)	(\$3,000)	(\$3,000)	(\$12,000)	(\$49,500)
Totals-Chapter 6	(\$415,793)	(\$75,001)	(\$75,001)	(\$75,001)	(\$75,001)	(\$715,797)	(\$49,500)

CHAPTER 7

COMMUNITY INVOLVEMENT

With a community population greater than 60,000, the city of Victoria has long demonstrated an understanding of the value for education, supporting both a community college and an upper-level university. Over the past five years, however, there has been a shift in how the community feels about its school district, due in large part to the board's 1999 decision to consolidate the district's two high schools. After months of deliberating over alternatives, the school board decided that consolidation of the high schools afforded the greatest likelihood of achieving a more demographically and culturally diverse student body and allowed for more appropriate resource allocation. As a result of this decision, the Stroman campus now serves ninth and tenth grade students, and the Senior campus serves eleventh and twelfth grade students.

Responsibility for community involvement is infused throughout the district. For example, the board identifies community, business, and civic issues; sets related policy; and ensures that the superintendent addresses concerns with his staff in order to make instructional improvements. The superintendent works with staff to ensure that parent and student issues are brought to the attention of those who can best resolve them. The Communications specialist works with district and campus personnel to develop appropriate communication strategies and materials, and to disseminate information, including responses to inquiries and complaints. Campus administrators interact with their local communities, staff, parents, and students to assess public opinion and ensure that families and local businesses are given opportunities to become involved in their schools. The district staff also works with agencies, organizations, and community leaders to provide a wide array of services to children and families, many with special needs.

ACCOMPLISHMENTS

- VISD collaborates with area business, industry, and civic organizations to enhance student learning.
- VISD participates in the Engaging Latino Communities for Education (ENLACE) Program in collaboration with higher education institutions and other community organizations to help Hispanic students and their families develop the interest, commitment, and abilities necessary to enroll in and graduate from college.
- VISD uses various communication strategies and media formats to make information available to both internal and external stakeholders.

FINDINGS

- The prolonged VISD debate over whether to accept the consolidation of the two high schools or reconfigure the high school has divided the community and negatively affected constituent morale.
- VISD's community involvement efforts are not centrally coordinated, making it difficult to track, publicize, and evaluate the overall quality of the efforts.
- VISD has not fully integrated service learning into the curriculum, nor does it make use of the strategy to cultivate business and community connections.
- VISD does not have an annual communications plan, nor does it consistently evaluate its communication function.
- VISD's organization chart, personnel directory, and web site are difficult to navigate and search.

RECOMMENDATIONS

- **Recommendation 67 (p. 113): Create an ongoing community planning committee to engage the community and district in mutual educational improvement goals.** VISD should assemble a diverse group of at least 30 representatives of various community constituencies, including economic, social, cultural, educational, and faith-based organizations, that can serve as advisors on an in-depth community planning task force. These teams would identify district strengths, weaknesses, opportunities, and threats and develop a list of long-term goals for the district.
- **Recommendation 68 (p. 114): Centralize coordination of VISD's community involvement strategies to better monitor, track, and publicize activities.** The district should create a team to coordinate and track all volunteer activity. Ideally, the team would comprise the superintendent, a principal from each school level, the Communications specialist, and the director of Federal Programs, since these officials are primarily responsible for community involvement activity. The Communications specialist should develop a publicity campaign that describes the ways in which the district interacts with the community and create supporting materials for distribution.
- **Recommendation 69 (p. 115): Expand and integrate service learning into the secondary school curriculum to foster business/community connections,**

participation, and support. The district should phase service learning programs into the curriculum, beginning in the high school. As more and more students work on business or community projects, either in teams or as individuals, they create good will, improve understanding, and generate business and community support for school initiatives. Service learning frequently benefits school districts as an ever-broadening network of contacts, ideas, and community participation.

- **Recommendation 70 (p. 116): Create an annual plan for communicating district information, events, and activities to various stakeholders.** The plan should be tied to the strategic plan and include measurable goals and objectives, specific strategies, and the required financial and personnel resources. It should be reviewed regularly to ensure that communication efforts are relevant to the task and that resources are adequate and appropriate.
- **Recommendation 71 (p. 116): Improve public information resources to invite community involvement in user-friendly, informative ways.** The Communications specialist, superintendent, and assistant superintendents should redesign the district's organization chart and related web site information, so that parents and community members can readily connect with contacts. The personnel directory should be arranged by topical area. A section on community involvement should list a contact number for volunteers, business partnerships, and various family outreach programs with a brief description of the purpose of each in order to encourage participation.

DETAILED ACCOMPLISHMENTS

BUSINESS COLLABORATIONS

VISD and the business community collaborate in a variety of ways to better leverage resources and enhance the educational experience for all students. Local businesses and civic organizations provided nearly \$100,000 in scholarships to more than 140 VISD students during 2003-04. They also donate their time to inform students about the world of work during career exploration programs. The Golden Crescent Alliance for Minorities in Engineering works with school districts to introduce minorities and females to career opportunities via summer camps and technology competitions. Area businesses and organizations also provide prizes, supplies, and financial assistance in support of various school initiatives. The Chamber of Commerce sponsors a Summer Leadership Program

for middle school students, and a chemical company supports a wetlands science project. Businesses also provide special student recognition programs for achievement in various areas, such as the Rotary Club's celebration of the district University Interscholastic League (UIL) championship. Also, the Mid-Coast Regional Science Fair Association works with the area medical community and petrochemical industries to make scholarships and awards available.

VISD also partners with several area businesses and associations, such as:

- Victoria Business and Education Coalition (VBEC), which supplies mentors for VISD students through the University of Houston-Victoria's (UH-V) Outreach Center;
- Cultural Council of Victoria, which offers a variety of performances for district students throughout the year; and
- Golden Crescent Workforce Development Board, which sponsors a summer internship program for teachers and provides two case managers through its Communities in Schools Program to work with at-risk students, one at a middle school and the other at the alternative high school.

It also has agreements with the City of Victoria, the American Red Cross, and the local YMCA to use school facilities when appropriate and necessary for programs that benefit students, like after school child-care and day camps.

VISD has a partnership with Making the Grade, a national non-profit foundation that seeks to improve the educational outcomes of students. The Victoria program focuses on promoting positive choices, empowering teens to become leaders, and providing parents and teachers with the tools needed to realize these goals. Specifically, the Making the Grade Foundation helps the district with the following:

- career-based initiatives, including career fairs, job shadowing, and job application/resume workshops;
- obtaining scholarships; and
- providing programs on abstinence, drug and alcohol resistance, violence prevention (including bullying), character education, and teen leadership.

ENLACE PARTNERSHIP

VISD enriches educational opportunities for Hispanic students through its partnership with area higher educational institutions in ENLACE, a W.K.

Kellogg Foundation initiative. The initiative is designed to strengthen the K-16 educational pipeline for Latino students. Its goals are to increase academic success, reduce barriers to college enrollment, and improve high school graduation rates. In high schools, the program targets academic and test preparation, parental involvement, mentoring, and internships.

VISD's ENLACE Program collaborates with other programs and groups to help Hispanic students become better prepared to enter and succeed in college.

- The GO Center, formerly the College and Career Center, is an outgrowth of the statewide College for Texans campaign—"Education. Go Get It." Partially supported by a grant from the Texas Business and Education Coalition (TBEC) and ENLACE, the Victoria GO Center operates on the Memorial High School (MHS) campus. Student mentors from the high school and UH-V's "G Force" received training in May 2004. Equipped with computers, a conference area, and a reference library, the GO Center provides student-led mentoring groups along with a physical location where students and parents can learn more about post-secondary education, including colleges, careers, testing, and financial support.
- Vision Victoria, established in 2003 as an ENLACE advisory group of nearly 100 Hispanic community members, organizations, business participants, and parents, serves as a resource support network and examines various issues on how to help Hispanic students develop more competitive college applications and how to identify needs within the Hispanic community.
- The Spring Connection, offered for the first time in 2004 in cooperation with Victoria College, is a conference-like event that highlights role models, or "local heroes," and provides information sessions on college accessibility. A collaborative effort among ENLACE, United Way, Victoria College, and other community organizations, the event targets low-income, minority, first-generation juniors and seniors in area high schools. Information sessions focus on college admissions processes, financial aid, student support services, careers, and presentations by hometown heroes. A luncheon with a keynote speaker is followed by Spring Fest, which features campus tours, an art show that includes VISD students, games, refreshments, and music.

COMMUNICATION STRATEGIES

Recognizing that it takes several techniques to reach all targeted audiences, VISD uses a variety of strategies for communicating with its internal and external stakeholders. For example, print materials include a number of different publications featuring information on district and school activities, including the strategic plan, annual reports, the student handbook and code of conduct, highlights of board meetings in "Board Notes," and campus newsletters. Several brochures and flyers are produced in both English and Spanish. Of special note are the magnet school program's four-color brochures, developed to inform parents and the community of their offerings. VISD also interacts with the local media to publicize events using well-conceived press releases in consistent format, public service announcements, and a few advertising videos. The district web site provides information on district contacts and policy, individual school campuses, job postings, news, and resources.

DETAILED FINDINGS

CONSOLIDATION ISSUE (REC. 67)

Many community members are concerned that the district's continued focus on the high school consolidation issue has drawn attention away from other problem areas like discipline, safety, overcrowding, and educational quality throughout the district. Input received from community open houses, focus groups, interviews, and surveys indicates that many community members believe that the ongoing dissension over consolidation has interfered with the district's ability to move forward and unite the community around a common purpose. Some constituents expressed concern that teacher recruitment could be affected by prolonged conflict over this issue.

The prolonged debate over whether to accept the current arrangement and move on, or "de-consolidate" into two high schools, or build a new high school and convert Stroman to a ninth grade center has not only divided the community but has also negatively affected constituent morale and forward momentum. Parents and community advocates repeatedly voiced concern that continued focus on the consolidation issue is depriving children of the education they deserve. Community and business leaders suggested that this issue could discourage new industry, and school personnel claimed that the problem has taken too much attention away from teaching and learning. In summary, the community is concerned that the ongoing consolidation issue will continue to draw energy and focus away from what they consider to be more substantive issues, such as maintaining

educational quality, solving discipline problems, improving morale, and restoring school district pride.

Other school districts with similar problems have regained community support by including them in long-term strategic planning efforts. For example, the Plainfield, New Jersey school district, which had struggled with demoralizing economic and social issues for years, was able to successfully assemble a large community planning task force of 225 people, many of whom worked on six design teams for a year and a half to hammer out a strategic plan that eventually led to the passage of a \$34 million bond measure for new facilities and technology. Student attendance and parent involvement also increased, disciplinary action decreased, after-school programs and peer tutoring increased, and the schools have adopted a reform program. By involving so many people at the outset and keeping them involved over a prolonged period of time, the district created a “shared responsibility” for what happens and does not happen in its schools.

VISD should establish a community planning committee to help with establishing long-term goals for the district and resolving current issues. The community should include 30 representatives from diverse constituencies including business, educational, cultural, social and faith-based organizations. Group facilitators should be appointed, and the larger group broken into smaller task force teams for brainstorming. Teams should report to the superintendent regularly, and the superintendent should schedule similar reports to the board. While committee membership may change, the committee should continue to function. This kind of “grass-roots” process can go a long way toward engaging the community in school improvement initiatives. As time passes, the committee may narrow its focus to two or three goals per year, such as technology improvement, resource allocation, or staff development. The district should continue to enlist the support of this committee indefinitely.

COMMUNITY INVOLVEMENT COORDINATION (REC. 68)

The lack of centralized coordination in VISD’s community involvement function makes it difficult to track, publicize, and evaluate its quality. Although district and campus leadership participates regularly in a variety of community involvement efforts and organizations and the district has forged several business and higher education partnerships, management has largely decentralized responsibility for tracking community involvement to various departments and campuses. This includes

monitoring volunteer activity, cultivating external relationships, organizing speaking engagements, ensuring minority participation, encouraging parental involvement, and analyzing data for trends, among other types of community involvement activity.

VISD administrators participate in their community in various ways, but coordinating, monitoring, and communicating involvement has not been a high priority. The superintendent participates and is a leader in numerous boards and organizations. School principals participate in local activities and organizations and rely on community volunteers for support. The director of Federal Programs has responsibility for a wide range of parent involvement efforts, and the Communications specialist publicizes district accomplishments, creates information pieces, and works closely with the media. Advisory committees provide valuable input on various topics. The district also relies on volunteers, particularly at the campuses, but there is no centralized function that is responsible for recruiting volunteers, training them in specific school policy and procedures, or tracking their activity throughout the district. The Communications specialist tries to match volunteers with appropriate settings, and the specialist also plans the recognition luncheon, but does not officially coordinate the volunteer program.

Exhibit 7-1 outlines some of the sources the district uses to obtain broad-based community participation.

When so many departments and program areas are involved in soliciting community input, participating in outreach activities, and creating family connections, it can result in duplication of effort, inefficient use of resources, and missed opportunities. A decentralized community involvement structure also makes it more difficult to plan publicity, communicate significant accomplishments, evaluate community involvement, and describe how all efforts come together to improve the educational process. School districts with well-developed community involvement goals, clearly defined outcomes, and an organized approach are more likely to have a positive impact in their communities.

The Lake County School District in Florida created a structure for community involvement that has helped the district coordinate its program and assess its accomplishments based on directed planning that effectively assigns and communicates responsibility.

VISD should centralize its community involvement efforts, to better monitor and adjust its strategies. Cataloging and analyzing various types of community involvement activities will help the district assess the relative value of each, consider

**EXHIBIT 7-1
REPRESENTATIVE COMMUNITY INVOLVEMENT ACTIVITIES**

INFORMATION SOURCE	PARTICIPANTS
Victoria Partnership	Superintendent
Memberships in organizations, service clubs, foundations	Superintendent, principals, other district officials
Parent involvement	Director of Federal Programs, campus administrators
Public information	Communications Specialist, Superintendent
Volunteer assistance	Various district and school personnel
Board committees:	
▪ Policy	Trustees, one teacher, top-level administrators
▪ Facilities	Three trustees, Superintendent, Maintenance Department staff, other department heads (as appropriate)
▪ Strategic Planning	Board members, administrators
Advisory committees:	
▪ District Education (reviews campus improvement plans, calendar, legislative mandates, for example)	Campus representatives, including community members and parents
▪ Site-Based Management	
▪ Insurance	Two trustees, representatives of all employee groups
▪ Career Development School	Representatives from area businesses and agencies in career areas taught
▪ Science Planning Panel	Representatives from health care and petrochemical industries, parks and wildlife; educational community; VISD; and parents
▪ School Health ▪ Safe Schools/Healthy Students ▪ Safe and Drug Free Schools	Representatives of the medical and higher education community, social services and community action agencies; VISD food service, MHS school nurse, other school officials; Region III Education Service Center (ESC); faith-based organization representative
▪ Federal Programs	District and school staff; representatives from community and faith-based organizations
▪ Even Start	Educational representatives (VISD, Headstart, literacy council, Victoria College, University of Houston -Victoria); representatives from area social service agencies
▪ Victoria Coalition for the Homeless	Government agency representatives (e.g., housing, health, protective services); representatives of the medical and higher education community; social services and community action agencies; VISD federal programs director and program staff; faith-based organizations
Task forces (examples):	
▪ Substance Abuse	Board members, school officials, community representatives, law enforcement
▪ High School Schedule	Assistant principal, other administrators, teachers, counselors, parents, non-parents.
▪ Strategic Planning and Innovative Research Teams	Trustees, administrators, community representatives, school and central administration representatives; parents and community representatives
▪ Vision Victoria (focused on helping Hispanic students succeed)	Representatives from business, local government, and community, including one VISD trustee

SOURCE: VISD, April 2004.

alternatives, and re-allocate resources as appropriate. The team should review activity monthly; update the board, staff, and community; and evaluate the community involvement activities annually.

SERVICE LEARNING (REC. 69)

VISD has not fully integrated service learning into the curriculum, nor does it make use of the strategy to cultivate business and community connections. Service learning is an expected VISD student outcome, identified in the strategic plan: “Students will demonstrate leadership and citizenship skills by...completing a service learning project.” VISD does participate in a state funded service learning project at the Mitchell Guidance Center and, as of March 2004, 128 students had logged 600 hours of community service time with several area agencies. In addition, other students serve as peer tutors, and

school organizations encourage students to volunteer in their communities. However, service learning in VISD has a limited focus, is not yet required for graduation, and is not used as a strategy to foster relationships with the business community.

Incorporating service learning into public schools is growing in popularity across the country. This educational strategy requires students to help out in their communities by incorporating service experience directly into their schoolwork. Service learning provides students with real-life experience in a structured environment. Service learning also has the potential to strengthen community/business relationships and build cultural understanding. Over time, service learning results in a sense of shared vision and “ownership” in what happens in public schools.

In 1999, the National Center for Education Statistics (NCES) of the U.S. Department of Education found that 64 percent of all public schools, including 83 percent of high schools, had students participating in community service activities recognized by and/or arranged through the school; 57 percent organized the activities for their students; and 32 percent built it into the curriculum, including nearly half of all high schools. In addition, 83 percent of schools offered some type of support to teachers interested in integrating service learning into their curricula, and most schools with service learning cited strengthening relationships among students, the school, and the community as key reasons for adopting the practice.

VISD should implement service learning as a pilot project, beginning with 10 teachers at the high school level. Teachers would earn \$300 stipends during their first year of participating in a service learning project. Two trainer/mentors, selected from the pilot group, could receive similar stipends to work with five new teachers each in subsequent years. Assuming that the district pilots the project in 10 classes the first year at a cost of \$1,000 for training and stipends of \$300 for each teacher, the project would cost the district \$4,084 in the first year ($\$1,000 + (\$300 \times 1.028 \text{ per teacher} \times 10 \text{ teachers} = \$4,084)$). For 10 classes each additional year at \$300 per teacher and \$300 for two trainer/mentors, the annual cost would be \$3,701 ($\$300 \times 1.028 \times 10 \text{ teachers} [\$3,084]$, plus $\$300 \times 1.028$ each for two trainer/mentors [$\$617$]). The district should seek external funding to help support the program on an ongoing basis from businesses that have previously participated in the project. The district should also seek federal grant and other opportunities available to offset some of the costs.

COMMUNICATIONS PLAN (REC. 70)

VISD does not have an annual communications plan, nor is there strong evidence of an ongoing, consistent evaluation of communication efforts. The Communications specialist devises plans for communication in special event areas, and evaluation is based on the results when such results are measurable. One such event was the spring 2004 attendance campaign, the "Perfect Day," which resulted in 96.7 percent attendance. This is a 2.7 percent increase over the January 2003 Perfect Day. Four schools achieved perfect attendance. Another example of a specific communications plan is the one in place for dealing with a crisis or unplanned event, which spells out who is to be notified and how. However, there is no ongoing plan that describes the events scheduled for the year, types of publicity required, resources needed, persons responsible, or outcomes expected.

A clear plan for public relations combined with effective communication helps ensure positive relationships with key audiences. The National School Public Relations Association has identified criteria for successful school public relations programs. These standards hold an expectation that a school district governing board will adopt such criteria, that public relations officials will develop policies and procedures that conform to them, and that these officials will be positioned within the institution to be strategic leaders. This kind of framework sets the stage for the development of a "systematically planned" program, focused on meeting organizational goals, identifying the needs of various publics, and determining the best ways to reach them. To the extent possible, a good communications plan includes measurable goals, including what is to be accomplished, deadlines, responsibilities, resources, and strategies.

VISD should create an annual communications plan for communicating district information to stakeholders. The plan should be tied to the strategic plan and it should be reviewed regularly to ensure that communication efforts and resources are meeting district goals.

INFORMATION SOURCES (REC. 71)

Several sources of VISD information of interest to the community, particularly the organization chart, personnel directory, and website, are difficult to navigate and search. While administrators, staff, and veteran teachers may know who is responsible for different activities, this information, as well as how to use it, is not easily accessible to the general public.

The organization chart, for example, does not have a legend that clarifies the purpose of each function or position. For example, it indicates that there is a Federal Programs office, but it does not show or describe the various types of programs available to eligible families through this office. Similarly, although the chart shows that the ENLACE Program is a function of Student Services, its purpose of increasing educational opportunities for Latino students is not spelled out. Furthermore, the organization chart does not include the Communications specialist, who is the district's primary media spokesperson apart from the superintendent. It is also not easy to locate this person in the district personnel directory, which is generally organized alphabetically by department rather than by topic, which would make the document easier to use.

The "parent information" section of the web site does not make it convenient for parents and families to locate ways in which they can participate in school activities or engage in volunteer service. Also, web

site information of interest to parents and community is limited to basic documents, such as the student handbook, health-related materials, procedures, insurance, and assessment information.

A good organization chart lists all key players and ensures that their roles are obvious, and a directory of contacts is arranged for easy use. In addition, a school district that wants its community involved in what it does establishes numerous links to resources for parents and even makes it possible for someone to volunteer online.

The Bryan Independent School District (BISD) posts community involvement information, including resources, community links, and volunteer opportunities, in clear view on its web site. Its nationally recognized volunteer and mentoring programs enable the community to become involved in area education. Furthermore, the site is easy to navigate and well organized, making key information readily accessible.

VISD should improve its public information resources to make them more user-friendly. The organization chart should include a legend or similar device that would provide the public with a clear understanding of who is responsible for what. The web site should draw attention to community involvement activities and educational opportunities, so that parents and community members can readily connect with contacts, identify the purpose of important community assistance programs, and link to important community and Internet resources. Resources that make it easy for the community to gain access to district information and identify contacts enhances the likelihood of ongoing public interest and involvement.

For background information on Community Involvement, see p. 224 in the General Information section of the appendices.

FISCAL IMPACT

RECOMMENDATION		2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
CHAPTER 7: COMMUNITY INVOLVEMENT								
67.	Create an ongoing community planning committee to engage the community and district in mutual educational improvement goals.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
68.	Centralize coordination of VISD's community involvement strategies to better monitor, track, and publicize activities.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
69.	Expand and integrate service learning into the secondary school curriculum to foster business/community connections, participation, and support.	(\$4,084)	(\$3,701)	(\$3,701)	(\$3,701)	(\$3,701)	(\$18,888)	\$0
70.	Create an annual plan for communicating district information, events, and activities to various stakeholders	\$0	\$0	\$0	\$0	\$0	\$0	\$0
71.	Improve public information resources to invite community involvement in user-friendly, informative ways.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Totals-Chapter 7		(\$4,084)	(\$3,701)	(\$3,701)	(\$3,701)	(\$3,701)	(\$18,888)	\$0

CHAPTER 8 PURCHASING

Efficient purchasing requires management processes that ensure supplies, equipment, and services vital to the school's mission are purchased from a competitive source, in the right quantity, delivered to the correct location in a timely manner, and are stored in a secure location. Goods and services must be obtained according to the specifications of the end users, at the lowest possible cost, and within state laws and regulations, which include the state's general government purchasing and bid requirements and the Texas Education Code (TEC).

The organization structure of the Purchasing Department is unique to Victoria ISD. The VISD purchasing agent reports directly to the director of Plant Maintenance and Purchasing. Normally, a purchasing department falls under the finance or business office as purchasing is so closely tied to the financial operations of the district. VISD has no centralized contract management process, with each school or department responsible for managing their own contracts.

Purchasing staff consists of the purchasing agent, a central supply buyer, and a purchasing/central supply clerk. There are two full-time employees assigned to warehouse operations, a lead warehouseman and a warehouseman/driver. The warehouse also has a part-time student to assist with operations.

VISD's Central Supply warehouse and Food Services warehouse share a facility located at 2301 East Rio Grande. This facility also houses the district's MIS Tech room, surplus furniture inventory, and archives. The square footage of different units within the warehouse are as follows: freezer – 4,656 square feet; Food Services warehouse – 13,208 square feet; storage facility – 4,837 square feet; archives – 8,480 square feet; furniture storage area – 3,600 square feet; MIS Tech room – 1,408 square feet; Print Shop – 1,408 square feet; and Child Nutrition Offices – 1,320 square feet.

FINDINGS

- VISD has no centralized or comprehensive contract management policies and procedures. The absence of such policies and procedures places the district at risk for abuse by vendors, contractors, and district personnel.
- VISD's organization of its purchasing function hinders accountability and is not a sound practice of internal control. The direct reporting relationship between the purchasing function and the Maintenance Department is problematic because it impedes the Plant Maintenance and Purchasing director's ability to act as the

district's compliance officer for purchasing regulations.

- VISD does not properly account for the financial activities of its Print Shop and Central Supply Warehouse operations. As a result, the district cannot make an evaluation of the financial performance of either operation.
- The district is not leveraging the full capabilities of its office supply ordering system, which is making the ordering process unnecessarily cumbersome and time-consuming.

RECOMMENDATIONS

Recommendation 72 (p. 119): Centralize contract management and develop comprehensive written policies and procedures to manage and monitor all contracts through the Purchasing Department. At a minimum, policies and procedures should include the following: standards, such as dollar limits on contract legal review; a list of individuals who can obligate the district with their corresponding limits of authority; and step-by-step instructions on how the contracting process works. The Purchasing Department should manage all contracts to ensure that they are compliant with all terms and conditions as well as all policies and procedures.

Recommendation 73 (p. 120): Reorganize the purchasing function to report to the chief financial officer. Reorganizing these functions will increase internal control and ensure proper segregation of duties.

Recommendation 74 (p. 121): Establish a separate set of financial records for the district's Central Supply Warehouse and Print Shop operations. VISD should account for all expenditures and monitor financial performance of each operation to ensure that the operations remain self-supported.

Recommendation 75 (p. 122): Provide districtwide user access to the online office supply catalog for future supply agreements. Utilizing the online catalog capabilities of the office supply vendor will expedite the requisition process, locate supplies more efficiently, and reduce the possibility of errors from manual processes.

DETAILED FINDINGS

CONTRACT MANAGEMENT (REC. 72) VISD's contract management is not centralized and lacks comprehensive policies and procedures. The absence of such policies and procedures places the

district at risk for abuse by vendors, contractors, and district personnel. Although VISD maintains a purchasing manual, is governed by state regulations, and has an adopted board policy, no comprehensive policies and procedures exist to guide the district on contracting matters.

The district allows each user department to enter into and manage their own contracts. The Purchasing Department manages and maintains contract files only on those contracts awarded by the board. VISD does not provide user departments and schools a written list indicating who can sign contracts nor the level at which they can obligate the district. Because the district does not manage or maintain contracts in a centralized location, VISD cannot determine the number and amount of contracts it maintains.

The user departments and schools evaluate price, terms, service, and other requirements prior to issuing a purchase order requisition. The district relies on the departments and schools to manage their own contracts without providing them process guidelines. For example, the district does not have guidelines to explain when a contract should receive a legal review. According to the Purchasing agent, the school attorney reviews contracts that are deemed complex, but it is up to user departments and schools to decide which contracts meet this definition. As a result, contracts that require a legal review may not receive it.

The review team discovered that the district does not have an executed contract with a professional services company that provided more than \$120,000 worth of security services in 2002–03. A professional service contract is generally documented with a letter of agreement that states the service to be performed and the price for the service. Without contracts, the district puts itself at risk of not receiving appropriate services from its vendors. A contract's terms and conditions contain language meant to ensure the district receives contracted goods and services from vendors at the contracted price and in the specified manner.

Many school districts and other governmental entities have contract management policies and procedures that include the following:

- Required legal review of contracts above certain dollar values;
- Identification of individuals who can sign contracts and at what dollar limits; and
- Detailed description of the contract management process to departments and campuses.

For example, the University of Houston has contract management policies, procedures, and guidelines. The guideline has frequently asked questions regarding contract management, contracting forms, and other useful information regarding contracting. The information is available on the following Internet address:

<http://www.dt.uh.edu/facultyandstaff/contracts/index.html>

The Purchasing Department should be given the responsibility to develop and manage contract management policies and procedures. At a minimum, policies and procedures should include the following: standards, such as dollar limits on contract legal review; a list of individuals who can obligate the district with their corresponding limits of authority; and step by step instructions on how the contracting process works. The Purchasing Department should manage all contracts to ensure that they are compliant with all terms and conditions as well as all policies and procedures.

ORGANIZATION STRUCTURE (REC. 73)

VISD's organization of its purchasing function hinders accountability and is not a sound practice of internal control. The direct reporting relationship between the purchasing function and the Maintenance Department is problematic because it impedes the district's ability to ensure compliance with purchasing regulations.

Before 1997, Plant Maintenance and Purchasing were separate departments with different directors. Both directors reported to the assistant superintendent for Support Services, a position that was eliminated in 2000. After the Plant Maintenance director retired in December 1997, the two departments began reporting to the director of Purchasing and Warehouse Operations. The title of that position was changed to the director of Plant Maintenance and Purchasing to indicate oversight of both functions.

The Purchasing agent oversees the Purchasing Department and reports to the director of Plant Maintenance and Purchasing. The director of Plant Maintenance and Purchasing oversees the entire Plant Maintenance Department and has the ability to develop purchase requisitions for the department. However, with the approval of the Purchasing agent, a requisition from a department becomes a purchase order. Therefore, when a requisition is received from the Plant Maintenance Department, the Purchasing agent is in the unique position of having to decide whether to approve a requisition from the person to whom she reports on a day-to-day basis, an inappropriate segregation of duties. Having the

Purchasing agent report to a director who oversees a department responsible for a large number of the district’s purchases could potentially send a negative message to taxpayers and expose the district to speculation regarding its purchasing practices. Although the review team has not seen evidence of any such issues resulting from the current reporting relationship, the perception of a conflict is detrimental to a system of good internal controls.

While the Purchasing agent is the district’s final authority for approval of purchase orders, the agent relies on the director of Plant Maintenance and Purchasing for advice on complex cases. The current reporting structure could potentially interfere with the district’s ability to effectively monitor the Plant Maintenance Department’s compliance with purchasing laws, statutes, regulations, policies, and procedures. The Purchasing agent monitors districtwide compliance and ensures consistency in record keeping, documentation, and execution of procedures. VISD must ensure that the district can defend purchasing decisions against the scrutiny of taxpayers, the media, auditors, and state and federal agencies.

Compared to its peers, VISD is the only district with a purchasing function linked to another operational function rather than to the district’s chief financial officer or business office. **Exhibit 8-1** shows the position to which the purchasing function reports for VISD and its peers.

In both public and private sectors, it is common for the purchasing function to report to a financial administrator position. This is a common practice because the finance and purchasing functions are so closely interrelated.

VISD should reorganize the Purchasing function to report to the chief financial officer and recommend the organizational change to the board. Upon approval by the board, the superintendent should notify the district about the organizational change.

CENTRAL SUPPLY INTERNAL SERVICE FUND (REC. 74)

VISD does not properly account for the financial activities of its Print Shop and Central Supply

Warehouse operations. As a result, the district cannot make an evaluation of financial performance for either operation. The Central Supply Internal Service Fund is comprised of Warehouse (Central Supply) and Print Shop operations. Revenues for each operation are tracked separately but expenditures are not. In addition, the district does not apply all associated expenditures to these funds. For example, payroll costs for print shop and central supply warehouse employees are funded through the district’s general fund and are not charged to the Central Supply Internal Service Fund. This makes it difficult to accurately measure the full cost of services provided by each of these two operations.

One purpose for establishing an internal service fund is to provide services to users more conveniently and at a lower cost. The intent of an internal service fund is to be self-supporting, which means the funds should be operated like a business. To ensure an internal service fund is self-supporting, all revenues and expenditures associated with the activities of the fund must be accounted for, and all services provided to users and clients should be billed.

As indicated on the district’s annual financial audits, the district’s combined central supply warehouse and print shop operations are not cost effective and therefore create a draw on the general fund. However, because the financial records for these operations fail to track both revenues and expenditures, the district cannot determine the financial performance of either operation.

To obtain a better understanding of the financial performance of these operations, the review team applied the appropriate personnel costs to both operations, as shown in **Exhibit 8-2**. In order to be conservative, the review team excluded the salary of the director of Plant Maintenance and Purchasing, the Purchasing agent’s salary, and one-half of the Purchasing/Central Supply clerk’s salary.

As **Exhibit 8-2** shows, after accounting for personnel costs, these operations are not self-supported. The district has lost a total of \$488,561 from 2000–01 through 2002–03 and continued to lose money in 2003–04 from its warehouse and print shop operations. Additionally, as per the August 31,

**EXHIBIT 8-1
VISD AND PEER COMPARISON
PURCHASING DEPARTMENT REPORTING STRUCTURE**

DISTRICT	REPORTS TO:
Victoria	Director of Plant Maintenance and Purchasing
Bryan	Chief Financial Officer
Tyler	Chief Financial Officer
Lamar	Assistant Superintendent for Business
Wichita Falls	Chief Financial Officer

SOURCE: VISD and peer district organizational charts, May 2004.

**EXHIBIT 8-2
COMBINED REVENUE, EXPENDITURES AND PROFIT/LOSS NUMBERS FOR
CENTRAL WAREHOUSE AND PRINT SHOP OPERATIONS**

	2000-01	2001-02	2002-03	2003-04*
Revenue	\$951,437	\$997,598**	\$863,919**	\$580,952
Miscellaneous Revenue	4,437	5,062	7,896	2,425
Total Revenues	\$955,874	\$1,002,660	\$871,815	\$583,377
Cost of Sales	748,232	816,389	724,156	489,737
General Administration	180,731	181,701	170,770	154,548
Capital Outlay	-0-	33,478	9,850	-0-
Salaries and Wages	151,656	145,591	156,356	91,957
Total Expenditures	\$1,080,619	\$1,177,159	\$1,061,132	\$736,242
Profit/Loss	(\$124,745)	(\$174,499)	\$189,317)	(\$152,865)

SOURCE: VISD, Detail Expenditure Status Report, 2000-01 through 2003-04.

*NOTE: through April 2004.

** NOTE: Revenues and sales do not match due to accounting adjusting entries.

2003 financial statement, the Central Supply Internal Service Fund had a liability of \$264,510 due to the general fund. Similar amounts are recorded for 1997-98 through 2001-02.

The district's failure to properly account for all expenditures associated with these operations and its inability to assess each operation's financial performance places VISD at risk of subsidizing these functions without knowing the full financial impact to the general fund. Used properly, internal service funds allow an entity to determine cost feasibility of operations and outsource a function, if deemed feasible.

The district should establish a separate set of financial records for the district's Central Supply Warehouse and the Print Shop operations. The business office should create separate accounting codes for each operation and work with staff to implement the new codes. After accounting for all expenditures and adjusting pricing structures to cover costs, the district should compare the prices of its items and services to those of outside vendors. If the district cannot provide the same quality services at a competitive price, it should consider outsourcing and closing these operations. The district should also ensure the fund reimburses \$264,510 to the general fund.

**OFFICE SUPPLY ORDERING
PROCESSES (REC. 75)**

The district is not leveraging the full capabilities of its office supply ordering system, which makes the ordering process unnecessarily cumbersome and time-consuming. The district has a formal agreement with a vendor that carries approximately 25,000 items in its office supply catalog. This agreement is due for bid. In fiscal year 2002-03, VISD processed 1,198 purchase orders with this vendor, for a total of 3,582 line items, at a cost of \$355,251.

Under the current process, a user needing to purchase office supplies looks at a hard copy of the vendor's office supply catalog to find the items for their requisition. Prices are not provided in the hard-copy catalog but are available in the online catalog, which is accessible from the Internet using a login and password. Access to the online catalog at VISD is currently limited to Purchasing Department staff. Therefore, departments and schools must call or e-mail the Purchasing/Central Supply clerk to obtain pricing for each required item. The clerk then logs into the online catalog to obtain pricing. According to interviews with staff, the clerk usually provides a response to inquiries the next day, if not the same day. Despite this prompt turnaround time, users still find the process to be inconvenient. **Exhibit 8-3** provides a diagram of the current office supply ordering process.

The district does not utilize the online catalog system function, which allows multiple users access to product descriptions and pricing while restricting access to the ordering process.

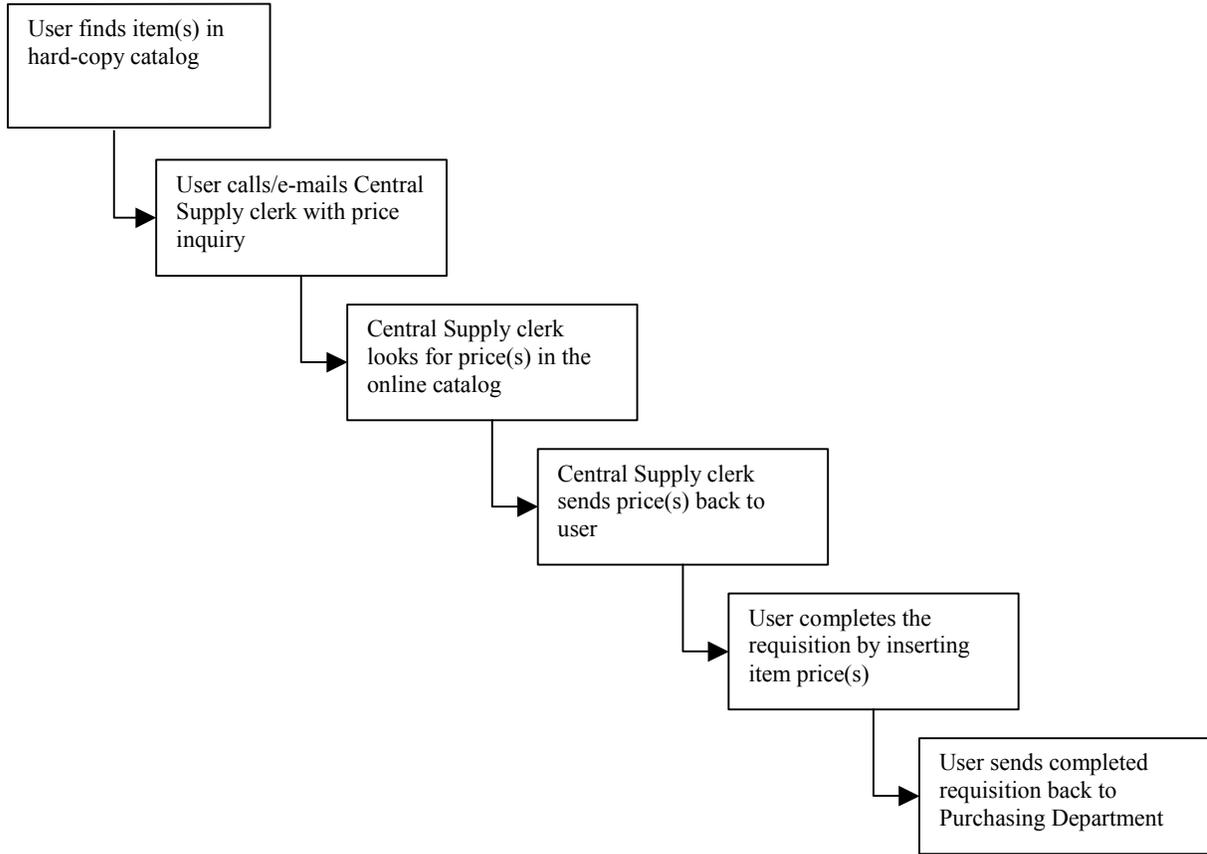
Duke University, San Francisco State University, Yale University, Western Washington University, Spartanburg County School District, and Cedar Hill Independent School District all use online catalogs for ordering office supplies.

Some advantages to districtwide user access are as follows:

- Immediate identification of prices, significantly speeding up the requisition process;
- Leveraging the search capabilities of the system to find supplies more quickly; and
- Reducing the possibility of errors that can result from manual processes.

The district should provide districtwide user access to the online office supply catalog for future supply agreements. By maintaining control over the district's

**EXHIBIT 8-3
VISD OFFICE SUPPLY ORDERING PROCESS**



SOURCE: Observation of work processes and interviews with Purchasing and user department staff, May 2004.

purchases, the district would ensure the contract is not depleted prematurely through inappropriate ordering. Requisitions can be sent to a single user, such as the Purchasing agent, who can then review, modify, approve, print, or delete the request. Access to system functions, such as modifying requisitions, is controlled through the use of login names and passwords to allow for varying degrees of access.

For background information related to Purchasing, see page 228 in the General Information section of the appendices.

FISCAL IMPACT

RECOMMENDATION	2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
CHAPTER 8: PURCHASING							
72. Centralize contract management and develop comprehensive written policies and procedures to manage and monitor all contracts through the Purchasing Department.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
73. Reorganize the purchasing function to report to the chief financial officer.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
74. Establish a separate set of financial records for the district's Central Supply Warehouse and Print Shop operations.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
75. Provide districtwide user access to the on-line office supply catalog for future supply agreements.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Totals-Chapter 8	\$0	\$0	\$0	\$0	\$0	\$0	\$0

CHAPTER 9

FINANCIAL MANAGEMENT

School district financial management involves the effective use of limited resources to support student achievement. A school district's financial operations must comply with federal, state, and local laws and regulations. The Texas Education Agency (TEA) requires a district's financial operations to comply with the guidelines of the Financial Accountability System Resource Guide (FASRG). The FASRG combines requirements for financial management from a variety of sources into one guide for Texas school districts.

VISD levies property taxes composed of a maintenance and operations (M&O) component and an interest and sinking (I&S) component. Taxes collected from the M&O component are used to fund the general operations of the district, while taxes from the I&S component are used to pay the district's bonded indebtedness. The total tax rate is the sum of the two components. VISD's total tax rate in 2003–04 was \$1.554, a 5.3 percent increase from 1999–2000. The approved 2003-04 maintenance and operations tax levy at \$1.456 was below the \$1.50 state imposed cap. The interest and sinking tax rate was \$0.098. On August 26, 2004, the VISD board adopted a total tax rate of \$1.5535 for 2004–05. The M&O component remained at \$1.456 while the I&S component was lowered to \$0.0975.

For 2003–04, VISD's total budgeted expenditures were \$89,982,427, which equals \$6,285 per student. Tax collections (current and delinquent) amounted to \$46,815,580, with total revenues of \$89,018,573. The district has \$3,035,435,796 in property valuations after all exemptions. The property value per student is \$212,031. The district has a board-adopted resolution establishing a minimum fund balance target and timeline to achieve the target. The goal was to reach and maintain a 16 percent fund balance by 2004–05. For each year from 1997–98 through 2002–03, the district met and exceeded these targets. The targeted percentage for 1997–98 was 5.5 percent. The district exceeded this target with a fund balance of 16 percent. The targeted percentages continued to increase. The district's target for 2002–03 was 13 percent. The district exceeded the 2002–03 target by maintaining a 15 percent fund balance.

ACCOMPLISHMENTS

- VISD issues a comprehensive annual financial report that is recognized by the Government Finance Officers Association for excellence in financial reporting.

FINDINGS

- VISD's tax effort is less than the rate that maximizes state funding. If the district maximized Tier 2 funding, the combination of state and local revenues would have provided funds necessary to address some of the district's needs. For example, the district does not have enough instructional computers to support learning; 32 percent of the district's bus fleet is 15 or more years old; and VISD does not offer competitive salaries, which makes it difficult to attract and retain high quality staff.
- VISD does not have adequate segregation of duties between payroll and personnel functions, creating a potential for abuse.
- VISD does not have a comprehensive business procedures manual. The lack of a business procedures manual eliminates a source of day-to-day guidance for central business office staff and other district employees and does not provide for continuity in the event of employee turnover.
- VISD maintains two petty cash funds of \$1,000 each, making the district vulnerable to the risk of loss due to theft and robbery. Cash expenditures are not subject to the normal controls in place for expenditures made through the purchasing system.
- VISD lacks a policy that requires a periodic procurement of external audit services. The district has used the same audit firm since 1993–94 and has not issued a request for proposal (RFP) since the current auditor was selected in April 1994.
- The district does not ensure corrective measures are implemented when internal audits of the district's activity funds identify a failure to comply with policies and procedures.

RECOMMENDATIONS

- **Recommendation 76 (p.126): The district should evaluate the proposed M&O tax rate in terms of Tier 2 funding from the state.** The board should be aware of and recognize the effect of adopting the tax rate in terms of Tier 2 funding. Adopting a rate lower than the rate needed to maximize state funding results in lost revenue to the district both in local taxes and state funding.

- **Recommendation 77 (p. 128): Segregate duties between payroll and personnel functions to strengthen internal controls.** Reorganize payroll and personnel functions so that payroll personnel are responsible for payroll calculation, preparation of payroll disbursement records, and preparation of payroll checks and the personnel function is responsible for documenting employee status, compensation, benefit records, approving employee status change documents, and preparing and updating payroll master files. The reorganization should also include an analysis of the number of positions required in each function based on the redistributed workload.
- **Recommendation 78 (p. 128): Create and adopt a comprehensive business procedures manual.** The business procedures manual should include all functions the business office controls or supports, including payroll, accounts payable, cash management, tax collections, accounting, and budgeting.
- **Recommendation 79 (p. 129): Reduce the amount in petty cash funds to \$250 to facilitate small, unplanned purchases.** The CFO should establish procedures that limit the amount and type of expenditures that can be made from the funds. No single expenditure should exceed \$100.
- **Recommendation 80 (p. 130): Develop and adopt an external auditor procurement policy and issue a request for proposal (RFP) to ensure fees are competitive.** VISD should enter into multiyear agreements with a planned competitive process at the end of the audit term.
- **Recommendation 81 (p. 130): Provide enforcement authority to the internal audits of the district's activity funds by including consequences for failure to comply with district policies and procedures.** The consequences should reflect the seriousness and frequency of the noncompliance. Consequences may include, but not be limited to, documenting the noncompliance in the administrator's evaluation or eliminating the school's ability to raise and spend activity funds.

DETAILED ACCOMPLISHMENTS

FINANCIAL REPORT

VISD issues a comprehensive annual financial report (CAFR) and has received the Government Finance Officers Association (GFOA) certificate of achievement for excellence in financial reporting for

1997–98 through 2001–02. The district expects to receive the same recognition for the 2002–03 CAFR submitted to the GFOA in 2003–04. The certificate of achievement program, sponsored by the GFOA and established in 1945, is designed to recognize and encourage excellence in financial reporting by state and local governments.

In order to be awarded the certificate of achievement, VISD published an easy-to-read and efficiently organized CAFR. The CAFR includes an introductory section, a financial section, a statistical section, and compliance reports on internal controls and federal program expenditures.

VISD's receipt of the GFOA certificate of achievement in financial reporting demonstrates the district's commitment to excellence in financial reporting.

DETAILED FINDINGS

TAX EFFORT (REC. 76)

VISD's tax effort is less than the rate that maximizes state funding. The state funding formula for general operations is based on two tiers of funding. Tier 1 funding is based on the adjusted basic allotment for the district times the average daily attendance (ADA) plus weighted funding for certain student populations. These student populations include special education, compensatory education, bilingual/ESL, gifted and talented, and career and technology. The funds generated from ADA-driven funding are referred to as "Tier 1 Entitlement". The new instructional facilities allotment, public education-grant allotment, and the transportation allotment are added to block grants for the total amount of Tier 1 funding.

VISD must share in the cost of Tier 1 funding through the local share. The local share is the equivalent of a \$0.86 tax rate on the prior year's values that is subtracted from the Tier 1 amount, and the difference is the state's share. Any tax effort above \$0.86, up to the state maximum rate of \$1.50, is used to access Tier 2 funding.

Tier 2 funding is based on the weighted average daily attendance (WADA). WADA is calculated by subtracting the transportation allotment, new instructional facilities allotment, and one half of the impact of the cost of the education index from the total Tier 1 amount, adding the set asides withheld from Tier 1, and dividing the result by the basic allotment. The education index accounts for differences in resource costs that are beyond the control of the district. The three components of the education index are: the average beginning salary of teachers in contiguous school districts, the percent of

economically disadvantaged students, and district size (in terms of ADA).

The guaranteed yield is \$27.14 per penny of tax effort per WADA; a district that cannot generate this amount with local revenue receives state aid to raise it to the yield for each penny of Tier 2 tax effort. Therefore, the district generates more Tier 2 revenue when the district’s tax effort is greater.

Tax effort for purposes of Tier 2 funding cannot exceed \$0.64 and is limited to the lesser of the district’s tax effort in the final year of the preceding biennium or to the tax effort of the current year. Tax effort is determined by subtracting \$0.86 from the effective tax rate. The effective tax rate is the result of dividing the current year’s M&O tax collections by the prior year’s certified taxable value, multiplied by 100. In order to maximize Tier 2 funding, the effective tax rate must be \$1.50 or more.

During the 2003–04 budget process, the administration provided the board with information that the district could earn an additional \$333,962 in state revenue by raising the M&O tax rate two cents. The district would also earn additional revenue from the higher property tax levy. The CFO said that the district had presented similar information in prior years and that the board had elected not to increase the tax rate since 2001–02. The board members said they were aware of the district’s ability to raise additional state funding, but did not want to raise taxes. In August 2004, the board members again adopted a tax rate that failed to maximize Tier 2 funding.

As a result of not maximizing the Tier 2 state funding, VISD did not receive \$5.9 million in state revenue from 1998–99 through 2003–04. **Exhibit 9-1** calculates the difference in funding based on the tax effort the district applied versus the maximum tax effort allowed by the funding formula. The formula for determining the amount of unearned revenue is calculated by multiplying the difference between the maximum tax effort allowed and VISD’s tax effort by the WADA, times the guaranteed yield,

times 100, less the local fund assignment. The local fund assignment is the quotient of the tax base divided by 100 times the difference in tax effort.

Any increase in state funding received by school districts impacts the state budget. If VISD had maximized Tier 2 funding during this period, it would have cost the state an additional \$5.9 million. If the district had maximized Tier 2 funding during this period, the combination of state and local revenues would have provided funds necessary to address some of the district’s needs. For example, the district does not have enough instructional computers to support learning; 32 percent of the district’s bus fleet is 15 or more years old; and VISD does not offer competitive salaries, which makes it difficult to attract and retain high quality staff.

VISD should evaluate its M&O tax rate in terms of Tier 2 funding from the state. The board should be aware of and recognize the effect of adopting the tax rate in terms of Tier 2 funding. Adopting a rate lower than the rate needed to maximize state funding results in lost revenue to the district both in local taxes and state funding.

The estimated difference in funding for current and subsequent years is presented in **Exhibit 9-2**. These calculations are based upon the following assumptions:

- The district maximizes its tax effort in 2006-07 in order to gain additional state funding in the following biennium;
- The district property values grow at \$73 million a year, as per historical data;

**EXHIBIT 9-1
STATE FUNDING DIFFERENCE
1998–99 THROUGH 2003–04**

	1998–99	1999–2000	2000–01	2001–02	2002–03	2003–04
Maximum Tax Effort	\$0.6400	\$0.6400	\$0.6400	\$0.6400	\$0.6400	\$0.6400
VISD’s Tax Effort	\$0.6078	\$0.5169	\$0.5159	\$0.6099	\$0.6027	\$0.5940
Difference	\$0.0322	\$0.1231	\$0.1241	\$0.0301	\$0.0373	\$0.0460
WADA	17,614.2	17,572.9	17,245.8	17,178.1	17,236.9	16,876.3
Guaranteed Yield	\$21.00	\$24.70	\$24.70	\$25.81	\$27.14	\$27.14
Times 100	100	100	100	100	100	100
State Funding Difference	\$1,189,815	\$5,341,413	\$5,286,272	\$1,334,842	\$1,743,850	\$2,105,993
Local Fund Assignment	\$834,660	\$3,370,890	\$3,491,050	\$854,605	\$1,114,951	\$1,390,464
Net Difference in Funding	\$355,155	\$1,970,523	\$1,795,222	\$480,236	\$628,899	\$715,528

SOURCE: Texas Education Agency, Summary of Finance, 1998-99 through 2003-04.

EXHIBIT 9-2
ESTIMATED STATE FUNDING DIFFERENCE
2004-05 THROUGH 2008-09

	2004-05	2005-06	2006-07	2007-08	2008-09
Maximum Tax Effort	\$0.6027	\$0.6027	\$0.6027	\$0.6400	\$0.6400
VISD's Tax Effort	\$0.6027	\$0.6027	\$0.6027	\$0.6027	\$0.6027
Difference	\$0.0000	\$0.0000	\$0.0000	\$0.0373	\$0.0373
WADA	16,876.3	16,876.3	16,876.3	16,876.3	16,876.3
Guaranteed Yield	\$27.14	\$27.14	\$27.14	\$27.14	\$27.14
Times 100	100	100	100	100	100
State Funding Difference	\$0	\$0	\$0	\$1,708,425	\$1,708,425
Estimated Tax Base	\$3,035,432,372	\$3,108,432,372	\$3,181,432,372	\$3,254,432,372	\$3,327,432,372
Divided by 100	\$30,354,324	\$31,084,324	\$31,814,324	\$32,544,324	\$33,274,324
Local Fund Assignment	\$0	\$0	\$0	\$1,213,903	\$1,241,132
Net Difference in Funding	\$0	\$0	\$0	\$494,522	\$467,293

SOURCE: Texas Education Agency, Summary of Finance, 2003-04, September 16, 2004 and vendor estimates.

- The district's WADA remains at the level reported in the September 16, 2004 TEA near final summary of finance;
- The guaranteed yield remains at \$27.14; and
- The state funding formula does not change.

Because VISD did not implement this recommendation for the 2004-05 year, the district will be limited to the tax effort from 2004-05 for the next biennium. By increasing the M & O tax rate from \$1.456 to \$1.50 the district would see additional state revenue of \$961,815 (\$494,522 + \$467,293); however, no savings could be realized until 2007-08.

SEGREGATION OF DUTIES (REC. 77)

VISD does not have an adequate segregation of duties between payroll and personnel functions, creating a potential for abuse. The payroll function performs a number of duties normally associated with personnel. These include payroll placing new auxiliary employees on the pay scales; calculating and entering raises for employees; distributing, receiving, and processing all new employee packets; explaining benefits to all new employees; and acting as a liaison for insurance concerns of employees. Segregation of duties is an important component of a strong system of internal control that ensures that no one individual controls all aspects of a financial process.

Payroll staff receives handwritten personnel data sheets documenting authorization for pay changes, new employees, or terminations. Personnel staff signed none of the personnel data sheets examined by the review team. The only personnel data sheets with an authorizing signature were for auxiliary employees in maintenance, transportation, and food service. In these instances, the department authorizing the employment or change in pay status signed the personnel data sheets.

For VISD, the lack of segregation of duties between the payroll and personnel functions could result in a

payroll employee changing the pay rate of an employee or giving preference to a new employee on pay scale placement. Although the review team did not find any indication that such irregularities exist at VISD, the potential for abuse exists.

Many districts provide a strong internal control environment through organization of the payroll and personnel departments and adequately defining responsibilities to ensure proper segregation of duties. These districts ensure personnel and payroll functions are performed and supervised by personnel in different departments. They ensure payroll personnel are responsible for payroll calculation, preparation of payroll disbursement records, and preparation of payroll checks. The personnel function is assigned the responsibilities for documenting employee status, compensation, benefit records, approving employee status change documents, and preparing and updating payroll master files. Through a segregation of duties, these districts have reasonable assurance that employees, in the normal course of performing their duties, would detect errors or wrongdoings in a timely fashion.

The district should reorganize payroll and personnel functions so that payroll personnel are responsible for payroll calculation, preparation of payroll disbursement records, and preparation of payroll checks and the personnel function is responsible for documenting employee status, compensation, benefit records, approving employee status change documents, and preparing and updating payroll master files. The reorganization should also include an analysis of the number of positions required in each function based on the redistributed workload.

BUSINESS PROCEDURES MANUAL (REC. 78)

VISD does not have a comprehensive business procedures manual. The lack of a manual eliminates a source of day-to-day guidance to central business office staff and other district employees and does not

provide for continuity in the event of employee turnover. A business procedures manual serves as documentation of the district's accounting policies and procedures and provides a formal communication to the user about processes used to create and complete financial transactions. The manual describes how procedures are actually performed in the district and explains the purpose of procedures as they relate to the internal control structure. The district does have printed procedures for the budget process, activity funds, and/or travel reimbursements.

Although the central business office staff members have software manuals and access to the FASRG, no comprehensive business procedures manual exists to provide guidance to employees. Some staff members have developed informal sources for guidance. For example, the senior bookkeeper has a set of typed desk procedures detailing the responsibilities of the position. The senior bookkeeper has added handwritten notes to the document with explanations of how certain processes work. The accountant for special programs keeps a folder of information on how to accomplish tasks that are performed on an infrequent basis.

VISD uses the Texas Association of School Boards (TASB) policy service to organize and update district policies. The TASB policies provide a framework for both the legal and local environment. A number of these policies are dedicated to financial topics and provide guidance on what to do; however, these policies do not provide guidance on how to accomplish specific tasks.

The Government Finance Officers Association (GFOA) has issued a statement supporting accounting policies and procedures manuals. GFOA states that accounting manuals should include the policies and procedures for accounting and other finance related functions, such as accounts payable, payroll, budgeting, investments, cash receipts, and financial reporting. By carefully documenting business processes, current and future employees can fully understand what is expected and required to accomplish their duties.

Many school districts have accounting policy and procedure manuals. These manuals define the authority and responsibility of all employees in financial management. They not only use the documentation of the accounting procedures to indicate the employee responsible for specific tasks, but also indicate who can authorize transactions and who is responsible for the security of records and assets. These school districts update their accounting manuals annually and when a change occurs in policies or procedures. School districts find the

accounting manual to be a valuable resource in training new employees and providing accountability for the accounting and finance functions.

The CFO should lead the effort to create and adopt a comprehensive business procedures manual that incorporates the district's policies, procedures, and practices. The completed manual should be posted to the district's website. Electronic posting will allow the manual to be updated without having to distribute copies to all schools and departments for inclusion in a paper manual.

PETTY CASH FUNDS (REC. 79)

VISD maintains two petty cash funds of \$1,000 each, making the district vulnerable to the risk of loss due to theft and robbery. Cash expenditures are not subject to the normal controls in place for expenditures made through the purchasing system. These controls include ensuring adequate budgeted funds are available and the expenditure is appropriate for the program making the purchase.

The accountant for special programs and a payroll clerk are the custodians of the petty cash funds. The cash boxes contain \$1,000 each in the form of currency, coins, and receipts. The petty cash funds are replenished on an as needed basis through the accounts payable system when the receipts are submitted for reimbursement. This ensures that the expenditures are coded to the correct fund, function, and object. The CFO said the amount in each petty cash fund was determined based on general use and need.

The funds are used for a variety of purchases. Based on the two most recent reimbursements of the petty cash funds, these expenditures include purchases for homeless students, food for after school programs, retirement awards for employees, attendance awards for students, and supplies for programs. The only purchase that totaled more than \$200 was the purchase of retirement awards for \$334.

In order to ensure access to petty cash and proper assignment of responsibility to each individual, VISD maintains two petty cash funds. External auditors count the funds each year during the external audit. The review team counted the currency, coins, and receipts in each petty cash fund and found both funds contained the appropriate amount.

The FASRG states, "A petty cash fund is used to reimburse employees for small expenditures for district supplies or services and to make small district purchases. Such a fund can save time, paperwork, and associated administrative costs. Authorization to purchase from this source is clearly defined in district or campus procedures and the dollar amount for

each purchase is limited (usually between \$50 and \$100). It is important that petty cash purchases be kept at a minimum.”

Some districts maintain petty cash funds to facilitate small, unplanned purchases. Most of these districts limit the amount of petty cash on hand to less than \$500 and determine the amount that can be used for any purchase. Some of these districts limit the dollar amount of expenditures from petty cash to the minimum dollar amount for which the district will issue a purchase order. These districts reduce their exposure to the risk of loss of funds.

VISD should reduce the amount in petty cash funds to \$250 and establish procedures limiting the amount and types of expenditures that can be made from the fund.

EXTERNAL AUDITS (REC. 80)

VISD lacks an external auditor procurement policy and does not require a periodic procurement of external audit services. The district has used the same audit firm since 1993–94 and has not issued a request for proposal (RFP) since the current auditor was selected in April 1994.

The last RFP was sent to eight firms. The district received four responses. The district awarded the audit to the current firm based on an evaluation of seven technical criteria and the proposed cost of the audit services. The recommendation to the board was to engage the firm for the 1993–94 external audit, with an option to extend for an additional four years through 1997–98. However, the district has continued to extend the contract in each subsequent year. The CFO said that only two other firms in Victoria have the expertise to audit school districts. The district has used one of the firms in the past and cannot use the other firm since one of the district’s accountants is married to a principal of the firm.

Audit fees have ranged from \$26,910 in 1999–2000 to \$23,500 in 2003–04. In 2002–03, audit fees spiked to \$47,515 due to the requirement from the legislature for the district to have dropout and state compensatory education audits, each costing \$12,000. This requirement was eliminated for 2003–04 and the following years.

The FASRG states, “The process of selecting an auditor consists of re-engaging the prior year auditor or seeking new auditors through the request-for-proposal process. A request for a proposal from independent audit firms can enhance the effectiveness of the audit procurement process. A request for qualifications, if used, would only be appropriate when an auditor change is being contemplated and would not be appropriate annually.

Expenses for administering and preparing the request for qualifications can be substantial.”

The GFOA recommends that governmental entities use a competitive process for the selection of independent auditors on a periodic basis and that the process actively seek all qualified firms available to perform the annual audit, stating “auditor independence would be enhanced by a policy requiring that the independent auditor be replaced at the end of the audit contract, as is often the case in the private sector. Unfortunately, the frequent lack of competition among audit firms fully qualified to perform public-sector audits could make a policy of mandatory auditor rotation counterproductive.” Competitive procurement on a periodic basis helps reduce audit costs.

Many school districts have established policies for the periodic competitive procurement of external audit services. Hays Consolidated ISD (HCISD) enters into multi-year contracts with external audit firms and seeks proposals at the end of the contract term, usually every five years. This practice does not exclude the possibility of the audit firm being re-engaged by the district when proposals are received, provides HCISD with continuity in the audit process, and ensures that the fees are competitive.

VISD should develop an external auditor procurement policy and issue a request for proposal (RFP) to ensure fees are competitive. A board-approved policy should require the issuance of an RFP for external audit services at least once every five years. By periodically submitting an RFP for its external audit, the district will ensure they are obtaining the best service at the lowest price. This practice will also bring VISD into compliance with the Government Finance Officers’ Association (GFOA) recommendations.

INTERNAL AUDIT POLICIES AND PROCEDURES (REC. 81)

VISD does not ensure corrective measures are implemented to address findings in the annual internal audits of the activity funds.

Activity funds include money raised by student groups or the general student body at the schools and is spent to benefit the students. The elementary and middle schools have a checking account for the activity funds and account for the receipts and expenditures using a commercial accounting software package. The high school activity funds are included in the annual audit by the external auditor since they do not have a checking account and the Central Business Office handles their funds. A summary of the annual audits is submitted to the administration for review each year.

VISD has no internal auditor on staff; therefore, the accountant for special programs conducts the annual audits of the activity funds. The special programs accountant audits the activity funds for compliance with the VISD Sponsor’s Guide to Activity Funds. The audit procedures performed by the accountant for special programs include the following:

- Testing to ensure the payee and amount listed on the report agrees with the check;
- Testing for dual signatures on the checks;
- Testing that invoices paid were properly canceled;
- Testing that the principal approval date was prior to the purchase date;
- Testing supporting documents for both office and sponsor receipts;
- Testing to ensure the check and cash breakdown on the receipts agrees with the deposit slips;
- Testing for required reports to principals and sponsors; and
- Testing for fundraiser approvals and summaries.

These procedures are designed to ensure that appropriate internal controls exist and are followed for the activity funds. Based on a review of the VISD audit reports on the activity funds from 2000–01 through 2002–03, several schools had the same findings reported for all three years. For example, eight schools’ audit reports found that the schools were not approving requisition forms before purchases were made, and two schools found that sponsors were not turning money into the offices promptly. The findings for the 2002-03 audits included improper use of receipt books or tabulation sheets at eight schools, negative account balances for school groups at two schools, sales tax being paid on

purchases at six schools, sponsors not turning money into the office promptly at four schools, and requisition forms not being approved before the purchase at fifteen schools.

The accountant for special programs stated that audit findings are followed-up on during the next year’s audit; however, the accountant for special programs has no input on the disciplinary procedures for failure to comply with the district’s policies and procedures. The lack of disciplinary input reduces the authority of the audit function. The district has taken punitive action against one school for failure to comply by taking the checkbook away from the school.

Many school districts establish authority in the internal audit process by establishing consequences for failure to comply with district policies and procedures based on internal audit findings and recommendations. These consequences vary from low marks on the administrator’s evaluation for how the school’s business activities are handled to eliminating the school’s ability to have an activity fund. Principals are more likely to comply with policies and procedures governing activity funds when consequences are established and enforced.

VISD should provide enforcement authority to the audit function by including consequences for failure to comply with district policies and procedures. The consequences should reflect the seriousness and frequency of the noncompliance. Consequences may include, but not be limited to, documenting the noncompliance in the administrator’s evaluation or eliminating the school’s ability to raise and spend activity funds.

For background information related to Financial Management, see p. 232 in the General Information section of the Appendices.

FISCAL IMPACT

RECOMMENDATION	2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
CHAPTER 9: FINANCIAL MANAGEMENT							
76. The district should evaluate the proposed M&O tax rate in terms of Tier 2 funding from the state.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
77. Segregate duties between payroll and personnel functions to strengthen internal controls.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
78. Create and adopt a comprehensive business procedures manual.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
79. Reduce the amount in the petty cash funds to \$250 to facilitate small, unplanned purchases.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
80. Develop and adopt an external auditor procurement policy and issue a request for proposal (RFP) to ensure fees are competitive.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
81. Provide enforcement authority to the internal audits of the district's activities funds by including consequences for failure to comply with district policies and procedures.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Totals-Chapter 9	\$0	\$0	\$0	\$0	\$0	\$0	\$0

CHAPTER 10

TRANSPORTATION

Chapter 34 of the Texas Education Code authorizes, but does not require, Texas school districts to provide transportation for students in the general population to and from home and school, school and career and technology training locations, and extracurricular activities. The federal Individuals with Disabilities Education Act (IDEA) requires that a school district provide transportation for students with disabilities if the district also provides transportation for students in the general population, or if students with disabilities require transportation to special education services.

Victoria Independent School District encompasses 605 square miles. According to the latest transportation reports available (2002–03) from the Texas Education Agency (TEA), the district transported 4,425 students a total of 1,116,139 miles over 180 school days at a cost of \$2.04 per mile for the regular program and \$2.49 for the special program. TEA allocated state funds based upon a linear density of 0.90 at \$0.97 per mile. Total operations costs were \$2,732,506, with a state allotment of \$999,061. Transportation accounted for 2.5 percent of the district's total operating expenses.

The VISD fleet consists of 79 buses, five of which are used as spares in the event of a breakdown. The district operates 71 daily regular routes and 17 special program routes with a total of 73 drivers and 15 bus monitors.

ACCOMPLISHMENTS

- VISD's use of synthetic oil in buses reduces oil and maintenance costs and extends engine life.

FINDINGS

- VISD does not have an effective bus replacement plan resulting in an aging fleet.
- Although VISD has purchased software that identifies efficiencies in routing and scheduling, the district did not plan for such efficiencies through the annual budget process. No reduction in force or fleet size has been targeted even though the system can identify potential savings.
- VISD lacks procedures to properly account for and monitor all overtime paid to Transportation Department staff, which limits the district's ability to adequately assess staffing needs and makes it difficult for the district to analyze departmental overtime expenses.
- The Vehicle Maintenance System (VMS) used by the Transportation Department since 1992 has limited capabilities and does not fully meet the

requirements of a vehicle maintenance system. The software company has terminated all support for the system as of December 31, 1992; therefore no upgrades are possible. The computer housing the software cannot be replaced or upgraded, as the current software is not compatible with any other operating system.

- VISD lacks a process to accumulate discipline incidents by reason, bus route, or student in order to analyze trends and recurring problems that are necessary to identify required corrective actions and to implement appropriate action plans. Existing discipline incident codes in the student information database are insufficient to allow for accumulation of the required data.
- VISD's Transportation Department does not have fully documented department rules, regulations, or procedures.
- VISD does not have a performance measurement system for student transportation, nor does VISD track and make public reports on its student transportation performance in comparison with benchmarks.

RECOMMENDATIONS

- **Recommendation 82 (p. 134): Adopt a school bus replacement policy based on age or mileage, or a combination of both.** Implementation of a bus replacement policy will result in a newer, safer, and more efficient bus fleet.
- **Recommendation 83 (p. 135): Target a minimum 5 percent reduction in staff, with a corresponding decrease to the bus fleet, through utilization of the automated transportation management system.** The district's new automated transportation management system should allow for improved efficiencies. A conservative estimate of 5 percent savings will allow the district to reduce the number of bus drivers by three and eliminate three buses from the fleet.
- **Recommendation 84 (p. 136): Implement procedures to accurately account for and monitor all overtime paid in the Transportation Department.** By implementing this recommendation, total overtime will be reported on the monthly detail expenditures report, resulting in improved controls and monitoring of overtime.
- **Recommendation 85 (p. 137): Replace the vehicle maintenance system used by the**

Transportation Department with the system used by the Plant Maintenance Department for the general services fleet. The computerized maintenance management system used for the general services fleet has tools necessary to monitor and analyze maintenance expenditures; schedule preventative maintenance; and offers over 300 standard reports.

- **Recommendation 86 (p. 137): Create additional incident codes for school bus discipline incidents on the student information database, develop a process to analyze trends, identify necessary corrective actions, and create appropriate action plans.** The number of discipline incidents should be tracked as a performance measure to gauge the district’s provision of safe, orderly, and reliable transportation services.
- **Recommendation 87 (p. 138): Expand the scope of the draft Transportation Department employee manual and driver handbook.** Documentation should include all departmental rules, regulations, and procedures. Copies should be provided to each Transportation employee; new employees should receive the manual as part of their training.
- **Recommendation 88 (p. 138): Establish performance and cost-effectiveness measures and benchmarks for student transportation and provide an annual report card on all selected measures.** The reports should compare VISD’s performance with peers and established benchmarks.

**DETAILED ACCOMPLISHMENTS
SYNTHETIC MOTOR OIL**

VISD implemented a process to equip buses to operate on 100 percent synthetic motor oil. In 1992, the Transportation director started a trial program with two buses to test the benefits of using synthetic oil. The trial program proved maintenance costs could be reduced and engine lives extended. One of the two original buses did not have a full oil change for 12 years. With only filter changes, it accumulated over 228,000 miles before an oil change was performed. The second of the two trial buses has over 376,000 miles, with only six oil changes since it was converted at 42,000 miles. Extended oil change intervals are substantiated by analyzing oil quality at regularly scheduled intervals. VISD now has 31 buses equipped to use synthetic motor oil, saving the district approximately \$1,200 per year due to

prolonged oil change intervals, saving oil and labor costs.

DETAILED FINDINGS

BUS REPLACEMENT PLAN (REC. 82)

VISD does not have an effective bus replacement plan. The result is that of the 79 buses in the VISD fleet inventory, 32 percent, or 25 buses, are 15 or more years old. The average age of a bus in the VISD bus fleet is 11 years, as shown in **Exhibit 10-1**.

**EXHIBIT 10-1
VISD ACTIVE FLEET INVENTORY
BY MODEL YEAR
2003-04**

MODEL YEAR	NUMBER OF BUSES
1983	1
1985	3
1986	2
1987	6
1988	4
1989	7
1990	2
1991	15
1994	9
1995	1
1996	4
1997	4
1998	3
2001	7
2002	2
2004	9
Total Fleet	79
Average Age	11

SOURCE: VISD, Transportation Department Fleet Inventory, 2003-04.

A South Carolina study of life cycle costs for buses of a similar type to those used by VISD shows that 15 years or 250,000 service miles should be adopted as the benchmarks of the cycle for school bus replacement. This study also noted that school buses that accumulate mileage more quickly, such as the special needs school buses, should have their life cycle cost analyses based on mileage accumulation, not age. An average bus in the VISD fleet travels an average of 15,200 miles a year.

A bus replacement guideline, such as VISD’s, which is not based on age or service miles, results in a rapidly aging fleet. Older buses generally cost more to maintain. According to a report from the National Association of State Directors of Pupil Transportation Services, *School Bus Replacement Considerations*, two studies in California and Washington identified that “after 12 years of use, the annual operating cost of school buses begin to increase significantly and continued to increase each year thereafter.” The report also identifies safety as an issue with older buses. Older buses do not adhere to new requirements in the Federal Vehicle Motor

Vehicle Safety Standards or follow federal requirements or recommendations with respect to fuel efficiency and vehicle emissions.

Exhibit 10-2 shows the historical data for the number of buses that VISD purchased per year over the past 10 years. The data shows the district is inconsistent in the number of buses it replaces per year. The number of buses purchased per year ranges from zero to eleven. The data indicates on average four buses are added per year.

VISD placed nine new buses (Type C 77-passenger) into service in September 2003. The decision to purchase nine buses was based on the age of the fleet, the number of vehicles that were inoperable, and the rising cost to maintain and service the older buses. The current cost of a Type C 77-passenger bus is approximately \$66,700. VISD defrayed some of the cost of purchasing new buses by selling nine old buses at auction for \$6,475, an average of \$719 per bus, in January 2004.

Comal ISD adopted a vehicle replacement plan designed to replace buses every 11 to 15 years to coincide with the average 10 to 15 year bus life cycle. The plan is designed to maintain the necessary fleet size and concurrently reduce bus hazards by replacing buses once they reach the end of their life cycle. The plan also allows the district to stagger replacement costs.

VISD should adopt a bus replacement plan based on age or mileage, or a combination of both. **Exhibit 10-3** presents the recommended bus replacement schedule. VISD should replace nine buses a year until 2008, and in 2009, it should replace seven buses. A Type C 77-passenger bus costs about \$66,700. Using this figure as a standard, purchasing five additional buses through 2008 will cost \$333,500 per year (\$66,700 x 5). Three additional buses in 2009 will cost \$200,100 (\$66,700 x 3). The fiscal impact is based on a 16-year replacement cycle that is

calculated by dividing the recommended 250,000 service miles by the average annual miles per bus at VISD (250,000 miles / 15,200 miles per year = 16.4 years).

EFFICIENCIES THROUGH AUTOMATED ROUTING SOFTWARE (REC. 83)

Although VISD has purchased software that identifies efficiencies in routing and scheduling, the district did not plan for such efficiencies through planned staff and fleet reductions. In spring of 2003–04, the Transportation Department purchased the new system with plans to implement it in 2004–05.

The system will allow the district to automate route scheduling for both regular and special program routes, taking into account factors such as fleet size, seating capacity, safety concerns, district policy, environmental conditions, traffic patterns, and railroad crossings. The system also accounts for special needs of students.

The software developer states that with route scheduling automation, increased efficiencies are expected. Therefore, the district should experience efficiencies leading to reductions in bus driver staffing and bus fleet requirements needed to operate the Transportation function.

School districts that realized cost savings from increased efficiencies after implementing an automated transportation management system include Alvin ISD and Brownsville ISD.

In 2003–04, Alvin ISD began using the same automated transportation management system that VISD purchased. According to the routing and planning coordinator, the system enabled the district to combine routes and eliminate approximately 5 percent of the old routes. The district anticipates additional efficiencies will be realized during the next

**EXHIBIT 10-2
VISD HISTORICAL BUS PURCHASES
1994–2003**

YEAR SCHOOL BUS PLACED IN SERVICE	NUMBER OF REGULAR ROUTE SCHOOL BUSES	NUMBER OF SPECIAL ROUTE SCHOOL BUSES
2003	9	2
2002	0	0
2001	2	2
2000	3	0
1999	0	0
1998	4	3
1997	3	1
1996	0	1
1995	0	0
1994	9	0
Total	30	9
Average/year	3.9	

SOURCE: VISD, Transportation Department, Vehicle Maintenance System, Vehicle Expense Report, April 2004.

**EXHIBIT 10-3
RECOMMENDED SCHOOL BUS REPLACEMENT SCHEDULE
BASED ON 16-YEAR REPLACEMENT POLICY**

YEAR	CURRENT REPLACEMENT (4 BUSES/YEAR) BASED ON HISTORICAL DATA		ADDITIONAL BUSES TO MEET 16-YEAR REPLACEMENT SCHEDULE	TOTAL BUSES REPLACED (CUMULATIVE)
	REGULAR BUS	LIFT BUS		
2005	2	2	5	9
2006	3	1	5	18
2007	3	1	5	27
2008	3	1	5	36
2009	4	-	3	43
2010	4	-	-	47
2011-2019	28	4*	-	79

SOURCE: Gibson Consulting Group, Inc.

*NOTE: Equates to purchasing one lift bus in 2011 and 2012 and two lift buses in 2015.

school year. Brownsville ISD (BISD) purchased the same system to increase the efficiency of the district’s Transportation operation by automating the special education component of the department’s route scheduling. BISD stated an estimated 15 percent reduction in route scheduling labor hours.

VISD should target a 5 percent reduction in staffing with a corresponding decrease in the number of buses. Increased route effectiveness and efficiency are key areas to target. The system can enhance the safe transportation of students and create more efficient operations while reducing the number of drivers and buses needed. The system allows a route scheduler to visually analyze and manipulate routes, stops, and student schedule data as routes are created or edited. This process helps uncover hidden efficiencies that are difficult to identify through a manual process. By creating unlimited “what if” scenarios, the best routing and scheduling alternatives can be chosen.

Seventy-three bus drivers and a bus fleet of 79 are used to operate VISD’s 71 regular program and 17 special program bus routes. A minimum 5 percent reduction in bus driver staff should be possible by eliminating or combining routes. A 5 percent reduction equates to 3 bus drivers (73 drivers x 5 percent = 3.65. To be conservative the estimate is not rounded to the next whole number). Savings are calculated by adding salaries, variable benefits, and fixed benefits. Variable benefits include: Medicare (1.45 percent), workers’ compensation (4.21 percent), and TRS (0.4 percent) for a total of 6.06 percent of total salary. Variable benefits total \$737 (\$12,150 salary x 6.06 percent). Fixed benefits include health insurance contributions of \$2,700. The average annual salary of a full-time bus driver is \$12,150 based on 2003-04 payroll data. A reduction of three bus drivers should save the district \$46,761 or \$15,587 per driver (\$12,150 + \$737 + \$2,700).

The district should reduce the bus fleet by three in conjunction with the reduced driver staff. Based on

the average sales price of \$719 for nine buses sold at auction in January 2004 the district should achieve a one-time savings of \$2,157 (3 buses at \$719 each). Assuming the recommendations are implemented in January 2005, the fiscal impact for 2004–05 would be \$31,174 (\$46,761 / 12 months x 8 months). The total fiscal impact in each of the subsequent years is \$46,761.

OVERTIME REPORTING (REC. 84)

VISD lacks procedures to properly account for and monitor all overtime paid in the Transportation Department, making it difficult for the district to effectively analyze departmental overtime expenses. As a result, the department is unable to adequately determine when it would be more feasible to hire additional personnel rather than pay overtime to its current employees.

All drivers and bus monitors are classified employees and are paid on an hourly basis. Classified employees are “non-exempt”, which means that drivers working in excess of 40 hours per week are entitled to overtime. Overtime is paid at “time-and-a-half” for each portion of hours worked beyond 40 hours within a workweek while extracurricular trips are paid at two rates, driving time and wait time. If extracurricular trips result in overtime, a weighted average between the driving time and wait time is calculated to determine the compensation due. The Transportation Department’s overtime calculation methodology was implemented in 1992 following an audit conducted by the U.S. Department of Labor. Assignments of routes and extracurricular trips are scheduled to avoid or minimize overtime. Drivers are not guaranteed a minimum number of hours per day or per week; however, efforts are made to design routes and schedule drivers so that they receive the minimum number of hours to qualify for benefits.

The Transportation Department correctly calculates the total overtime due for each pay period. However, only the weighted hours are included on the detailed

expenditure status report as actual earned overtime. Therefore, the report is not an accurate source to report and monitor total overtime paid.

Many districts track and report overtime hours and expenditures to monitor and control overtime expenses. This is an effective process that provides Transportation management with the essential data to effectively keep overtime costs under control.

VISD should implement procedures to accurately account for and monitor all overtime paid in the Transportation Department. Implementation of this recommendation will require no system changes. Since overtime is manually calculated from time cards each pay period, the amount paid for hours in excess of 40 can easily be calculated and reported to accounting.

VEHICLE MAINTENANCE SYSTEM (REC. 85)

The Vehicle Maintenance System (VMS) used by the Transportation Department since 1992 has limited capabilities and does not fully meet the requirements of a vehicle maintenance system. The software company terminated all support for the system as of December 31, 1992; therefore no upgrades are possible. The computer housing the software cannot be replaced or upgraded as the current software is not compatible with any other operating system. The current system provides only basic information for monitoring and analyzing vehicle maintenance requirements and costs.

VISD's Plant Maintenance Department uses an asset-based computerized maintenance management system for its general services fleet. Key features of the system include the following: automated work orders, preventative maintenance scheduling and alerts, asset tracking, trend reporting, and over 300 standard reports. The software runs on the Microsoft Windows operating system and Microsoft Access database. According to the director of Plant Maintenance and Purchasing, the software functions well and is a useful tool in managing the maintenance functions for the general services fleet.

VISD should replace the system with the computerized maintenance management system currently used by the Plant Maintenance Department for the general services fleet. The transfer to this software will require the purchase of an additional license. The license fee is \$395 per computer. The license fee assumes the Transportation Department shares the database with the Plant Maintenance Department. The desktop computer that runs the VMS product must be replaced with one capable of running Microsoft Windows version 98 or above at an estimated cost of \$1,200. Desktop computers

capable of running this software are typically more expensive than the level of computers required for instructional needs. Training is offered at the vendor's site in Austin at a cost of \$995 per person excluding travel expenses. Travel expenses are estimated at \$209 [\$99 mileage (260.6 miles x \$0.38/mile), \$80 lodging, and \$30 meals]. An annual maintenance fee of 15 percent of the licensing fee, or \$59.25, is required to receive product updates and new releases. The one-time cost to the district is \$2,799 (\$395 licensing fee + \$1,200 computer + \$995 training + \$209 travel). The annual cost in 2005–06 through 2008–09 is \$59.

DISCIPLINE INCIDENTS (REC. 86)

VISD's Transportation Department lacks a process to accumulate discipline incidents by reason, bus route, or by student to analyze trends and recurring problems. VISD does not track student discipline incidents on the school bus in the student information database; therefore, safety violation trends cannot be analyzed to identify recurring problems or develop appropriate action plans. This inability to identify trends and develop timely action plans, impedes the district's ability to provide safe, orderly, and efficient student transportation services. Existing discipline incident codes in the student information database are insufficient to allow for accumulation of the required data. Bus drivers report incidents and discipline problems to the Transportation director on a "Notice of Safety Violation on School Bus" form. The form lists eight reasons that describe the conduct of a rider that is inconsistent with safety guidelines. A ninth category is included for other incidents not specifically included in the eight reasons. The form is three parts; the Transportation director maintains one copy of the form, while one is kept in the student's file, and one is mailed to the student's home.

Round Rock ISD (RRISD) tracks unsatisfactory school bus conduct referrals as one measure towards safe, orderly, and reliable transportation services. RRISD's website includes a report for transportation services that shows the monthly volume of unsatisfactory conduct referrals.

VISD's Transportation director should track discipline incidents by reason, bus route, student, and corrective action monthly and annually. The data should be monitored by school administrators for use in responding to the discipline incident referrals. The number of discipline incidents should be tracked as a performance measure to report the number of student discipline incidents per 1,000 students transported.

EMPLOYEE MANUAL/DRIVER HANDBOOK (REC. 87)

VISD’s Transportation Department does not have fully documented department rules, regulations, or procedures. Although the department has drafted an employee manual, it has not been formally adopted or shared with employees. Furthermore, a review of the draft manual reveals that it lacks clear and concise information regarding departmental operating procedures and detailed information regarding what employees need to know to conduct their jobs. The major topics of the draft manual include the following: district overview; personnel orientation; student and driver/monitor rapport; performance and operational standards; attendance; and routes.

Some Transportation staff said they have not received written procedures addressing operations in the field or departmental policies and procedures. They also said they did not know an employee manual was under development.

A Transportation Department handbook that incorporates best practices should include rules, regulations, and procedures that help ensure safe, economical, and efficient operations. Handbooks are also important to ensure the consistent administration of procedures and processes for vital functions, such as student discipline management, accident procedures, and other elements of student

and employee safety. **Exhibit 10-4** provides a sample table of contents of a model handbook. The manual should include basic facts regarding the operation of school buses for drivers.

VISD should expand the scope of the draft Transportation Department employee manual and driver handbook to include all departmental rules, regulations, and procedures. Draft versions should be presented to employees during team meetings and discussed to ensure staff input before finalization.

Each Transportation Department employee should receive a copy of the employee manual. New employees should receive the manual as part of their training. Employees should be required to sign a form signifying their understanding of the employee manual. The manual should be updated periodically to address changes in the department.

PERFORMANCE MEASUREMENT SYSTEM (REC. 88)

VISD does not have a performance measurement system for student transportation. It does not track its student transportation performance to gauge performance and identify areas of improvement related to routing and scheduling, staffing levels, maintenance performance, and safety.

Without a performance measurement system, district administrators have limited meaningful information

**EXHIBIT 10-4
TRANSPORTATION EMPLOYEE MANUAL
TABLE OF CONTENTS
EXAMPLE**

CHAPTER NAME	CONTENTS
Transportation Department Overview	Mission statement Goals and objectives Organization structure Contact list
Transportation Department Policies	Licensing requirements Leave/absences Hazardous route criteria Excessive ride times Driving violations Bus replacement Drug testing Physical examinations
Safe driving procedures and training	Defensive driving Loading/unloading Backing Railroad crossings
School bus safety	Daily inspections/safety checks Student conduct Emergency evacuation First aid
School bus accidents	Emergency procedures Notification Documentation

SOURCE: Gibson Consulting Group, Inc., June 2004.

available to make informed decisions. Key elements of a performance measurement system include measurable goals and objectives, performance indicators or measures used to gauge performance, and benchmarks or standards against which performance will be assessed. Performance measures include both short-term internal measures to evaluate day-to-day Transportation operations, such as driver absentee rates, and long-term measures for major aspects of the Transportation Department, such as the operating cost per rider, age of the bus fleet, and on-time performance of buses.

Examples of performance measures for student transportation are shown in **Exhibit 10-5**.

Round Rock ISD (RRISD) uses performance measures to determine how well the district is progressing toward reaching its goal to provide student transportation services that meet or exceed local, state, national, and international standards in all areas. RRISD displays performance data on their web site in the format of a “report card” to show how the Transportation function is performing. **Exhibit 10-6** below displays the performance measures tracked by RRISD’s Transportation Department.

VISD should establish performance measures and benchmarks for student transportation and provide an annual report card on all selected measures. The Transportation Department’s performance should be reported on a regular basis to the district superintendent, school board, and the public. Such reports will demonstrate the value and efforts of VISD’s Transportation functions. VISD should monitor some performance measures on a regular, short-term (e.g., monthly) basis, such as the number of bus breakdowns, driver/technician absenteeism, complaints received (e.g., buses not being on time, students not picked up), delayed vehicle maintenance (oil changes, inspections not conducted, etc.), and overtime paid. Other performance measures should be monitored annually, such as annual operational cost per student, vehicle breakdowns per 100,000 miles, the percentage of buses that are spare buses, accidents per 100,000 miles, and the percentage of students delivered within established ride time standards.

For background information related to Transportation, see p. 241 in the General Information section of the Appendices.

**EXHIBIT 10-5
RECOMMENDED STUDENT TRANSPORTATION
PERFORMANCE MEASURES**

CATEGORY	PERFORMANCE MEASURES
Safety	<ul style="list-style-type: none"> ▪ Accidents per 100,000 miles of service ▪ Buses exceeding target replacement policy ▪ Percent of employees receiving training ▪ Student discipline incidents per 1,000 students transported ▪ Age of bus fleet
Cost-Efficiency & Effectiveness	<ul style="list-style-type: none"> ▪ Operations cost per mile <ul style="list-style-type: none"> ◊ Regular routes ◊ Special routes ▪ Operations cost per rider <ul style="list-style-type: none"> ◊ Regular routes ◊ Special routes ▪ Percent state reimbursement
Service Effectiveness & Productivity	<ul style="list-style-type: none"> ▪ Route riders per mile <ul style="list-style-type: none"> ◊ Regular routes ◊ Special routes ▪ Route riders per bus <ul style="list-style-type: none"> ◊ Regular routes ◊ Special routes
Service Quality	<ul style="list-style-type: none"> ▪ On-time performance of buses ▪ Maximum rider trip time ▪ Complaints per 100,000 miles ▪ Driver/monitor attendance & retention rates
Maintenance Performance	<ul style="list-style-type: none"> ▪ Miles between road calls ▪ Percent preventative maintenance completed on time ▪ Number of buses off-line for maintenance

SOURCE: Gibson Consulting Group, Inc., June 2004.

**EXHIBIT 10-6
 ROUND ROCK ISD
 TRANSPORTATION DEPARTMENT PERFORMANCE MEASURES
 2003-04**

CUSTOMER REQUIREMENT: STUDENT ACHIEVEMENT	
GOAL	MEASURES
The Transportation Department will provide superb student transportation services that meet or exceed local, state, national, and international standards in all areas.	<ul style="list-style-type: none"> ▪ Number of interruptions to the learning environment caused by activities under our area of responsibility ▪ Student, staff, and community perceptions of the Transportation Department ▪ Benchmarks for on-time arrivals based on district history and industry standards ▪ Benchmarks for telephone complaints based on district history ▪ Percent of employees receiving training in all areas of the job responsibility
CUSTOMER REQUIREMENT: SAFE, ORDERLY, AND RELIABLE TRANSPORTATION SERVICES	
GOAL	MEASURES
Buses and facilities will be safe, secure, and nurturing places for students and staff.	<ul style="list-style-type: none"> ▪ Student, staff, and community perceptions of the safety of the Transportation Department ▪ Benchmarks for accident rate based on district history and industry standards ▪ Benchmarks for student misconduct based on district history and industry standards ▪ Benchmarks for on-time student arrivals based on district history and industry standards
CUSTOMER REQUIREMENT: EFFECTIVE AND EFFICIENT TRANSPORTATION OPERATIONS	
GOAL	MEASURES
The Transportation Department will use the Baldrige criteria to achieve performance excellence and improve customer satisfaction.	<ul style="list-style-type: none"> ▪ Percent of individuals using Baldrige criteria to assess, plan, and improve individual performance ▪ Benchmarks for ridership efficiency based on district history ▪ Benchmarks for field trips based on district history and industry standards ▪ Benchmarks for transportation efficiency measures based on district history and industry standards ▪ Benchmarks for breakdowns and mechanic efficiency based on district history and industry standards ▪ Employee dedication and satisfaction with department based on district history

SOURCE: Round Rock ISD Transportation Department website, <http://www.roundrockisd.org/transportation/>, June 2004.

FISCAL IMPACT

RECOMMENDATION	2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
CHAPTER 10: TRANSPORTATION							
82. Adopt a bus replacement policy based on age or mileage or a combination of both.	(\$333,500)	(\$333,500)	(\$333,500)	(\$333,500)	(\$200,100)	(\$1,534,100)	\$0
83. Target a minimum 5 percent reduction in staff, with a corresponding decrease to the bus fleet, through utilization of the automated transportation management system.	\$31,174	\$46,761	\$46,761	\$46,761	\$46,761	\$218,218	\$2,157
84. Implement procedures to accurately account for and monitor all overtime paid to Transportation Department staff.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
85. Replace the vehicle maintenance system used by the Transportation Department with the system used by the Plant Maintenance Department for the general services fleet.	\$0	(\$59)	(\$59)	(\$59)	(\$59)	(\$236)	(\$2,799)
86. Create additional incident codes for school bus discipline incidents on the student information database, develop a process to analyze trends, identify necessary corrective actions, and create appropriate action plans.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
87. Expand the scope of the draft Transportation Department employee manual and driver handbook.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
88. Establish performance and cost-effectiveness measures and benchmarks for student transportation and provide an annual report card on all selected measures.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Totals-Chapter 10	(\$302,326)	(\$286,798)	(\$286,798)	(\$286,798)	(\$153,398)	(\$1,316,118)	(\$642)

CHAPTER 11

ASSET AND RISK MANAGEMENT

Texas school districts have a fiduciary responsibility to protect publicly financed assets provided to educate children. Cash must be accounted for and prudently invested while maximizing interest earnings and complying with the Public Funds Investment Act (Act). Physical assets must be tracked and inventoried, and fixed asset capitalization policies and procedures must comply with Governmental Accounting Standards Board (GASB) statements 34 and 35. Fixed asset management should accurately account for district property and safeguard it against theft. An effective risk management program should control costs by adequately protecting against all significant losses at the lowest possible cost. The risk management program should effectively identify and measure risk and provide techniques to minimize its impact. Insurance programs for workers' compensation and district assets should be sound and cost effective to protect the district from financial loss. Employee health insurance coverage should provide optimal and affordable benefits at a reasonable cost.

VISD has placed its property casualty coverage with the Texas Association of School Board's (TASB's) Self-Funded Risk Pool. The district has purchased flood insurance from Fidelity National Insurance Company. AIG Life Insurance Company was selected as the district's stop loss carrier in order to protect the district from catastrophic losses to its health care plan.

Prosperity Bank is the district's depository institution. The district had outstanding bonds totaling \$34,691,189 on August 31, 2003, with investments totaling \$42,588,716 on February 29, 2004. The district's fund balance as of August 31, 2003 was 14.9 percent of budgeted expenditures.

ACCOMPLISHMENTS

- The district maximizes investment income by closely monitoring short-term variable interest rates.
- The district carries only the necessary level of insurance on its vehicles, saving valuable premium dollars.
- The district has taken aggressive steps to contain workers' compensation costs through its return-to-work program.
- VISD's Shelter-in-Place Program at Guadalupe Elementary effectively ensures the safety of every staff member and student in the event of a chemical or other disaster.

FINDINGS

- The district has not defined an acceptable level of risk for its self-funded healthcare plan. VISD has been unsuccessful in developing effective strategies in response to escalating health insurance costs, making it vulnerable to being unable to fully fund claims. Although twice in the last five years the workers' compensation fund balance has been used to offset health care liabilities, the district will have to use general fund balance reserves to pay for a portion of the plan's cost in 2003–04.
- The district's risk management function is not well coordinated with employee benefits and lacks adequate oversight by the chief financial officer. Currently, the risk manager reports to the director of Plant Maintenance and Purchasing. Although facilities management must be considered in the district's risk management plan, it is unusual to maintain the function in this department.
- The district's capital asset inventory policy and procedures for property custodians are inadequate, and physical inventories are not being performed consistently. Capital assets are not always tagged when received. No mechanism is in place to ensure physical counts are correct, and no consequences are imposed for missing items.
- VISD does not hold its property custodians accountable for damaged, lost, or stolen property. Items are occasionally moved to different locations without the proper paperwork being completed. As a result, the district cannot always distinguish whether assets have been moved from one location to another, discarded due to obsolescence, or are damaged, missing, or stolen.
- The district's decentralized activity fund structure and excessive number of activity funds make it difficult to ensure consistency and control of the funds. A total of 22 separate bank accounts are maintained. While the central office is responsible for reconciling all 22 accounts, including transaction activity of high school activity funds, each elementary and middle school is responsible for the transaction activity of their activity funds.
- The district does not maximize its armored car service to include payroll checks and other payments being sent to and from the Business and Finance Department. Payroll checks are

sent in a bright red color-coded envelope through inter-office mail to schools and departments, putting the district at risk for theft.

RECOMMENDATIONS

- **Recommendation 89 (p. 145): Determine and define as policy an acceptable level of risk for operation of a self-funded health care plan.** VISD should research and identify methods to keep the self-funded plan solvent, join the TRS ActiveCare plan, and/or conduct an expanded market search for private insurers willing to offer a traditional health insurance product to the district. Opportunities to reduce healthcare costs may include partnering with other public entities to raise buying power and implementing disease management programs.
- **Recommendation 90 (p. 149): Consolidate and centralize all employee benefit and risk management functions under the risk manager and ensure coordination with the chief financial officer.** A reorganization of the district's reporting structure would move risk management from the Plant Maintenance Department to Human Resources in order to more effectively coordinate employee benefits with other risk management activities. The risk manager and the chief financial officer should create a formal communication mechanism to ensure that risk management activities are adequately coordinated with the financial resources of the district.
- **Recommendation 91 (p. 149): Establish a comprehensive capital asset management process, purchase a bar code scanner system to tag all capital items upon receipt, and streamline the inventory process.** VISD should expand and maintain comprehensive inventory policies and procedures to identify the requirements, responsibilities, and accountability of property custodians.
- **Recommendation 92 (p. 152): Ensure the protection of district assets by assigning responsibility for capital assets to principals and department heads and hold these individuals accountable for the assets in their custody.** VISD should enforce the policy by assigning assets from a master list to each school at the beginning of the year. If any item from the list is missing without proper authorization and documentation of method of disposition such as transfer, sale, donation, or obsolescence, the chief financial officer should deduct the asset value from the next year's budget request for that school or department.

- **Recommendation 93 (p. 152): Consolidate the 22 activity funds, centralize all activity fund accounting, and post all activity fund transactions through the general operating account.** By centralizing the process, the district can ensure that standard procedures are followed, thus maintaining stronger control over the funds.
- **Recommendation 94 (p. 153): Expand the duties of the armored car service to include delivering payroll checks and receivables between the central office, schools, and departments.** Use of the red color-coded envelopes should be discontinued immediately. Plain sealed envelopes should be utilized and the current receipting process continued.

DETAILED ACCOMPLISHMENTS INVESTMENT POLICIES

The district effectively researches the investment market to identify the most favorable investment vehicles meeting the constraints of the district's investment policy. VISD's investment policy is based on the Texas Association of School Board's (TASB's) legal policy (entitled "CDA – Legal"). Investments are made in accordance with written policies approved by the board. The policies primarily emphasize safety of principal, liquidity and address investment diversification, yield and maturity, and the quality and capability of investment management.

As part of the investment policy, the board adopts a separate written investment strategy for each fund, or group of funds, under the district's control. Each investment strategy describes investment objectives for the particular fund.

The goal of the VISD investment program is to ensure the safety of the district's resources as well as to maximize financial returns within existing market conditions. Investments made on behalf of the district need to ensure the preservation of capital in the overall portfolio. The policy restricts any individual investment transaction that jeopardizes the total capital position of the overall portfolio.

VISD monitors the market to ensure it takes advantage of the most favorable yields available. The district's informal means of checking on investment changes has allowed the district to maximize its investment revenue. The chief financial officer recently renewed a certificate of deposit at the district's depository bank yielding 1.7 percent, as compared to the 1 percent yield being offered by the LoneStar Liquidity pooled investment fund. Currently, the district maintains three certificates of deposit at the depository bank. The yields range

between 1.65 percent and 1.75 percent. Because the certificates of deposit are not long-term investments, the district is in a position to quickly respond to changes in investment yields.

PROPERTY CASUALTY INSURANCE COVERAGE

By joining the TASB Property Casualty Self-Funded Risk Pool, the district saved on auto contributions with an innovative coverage structure. The district fully covers vehicles that are less than 10 years old, while older vehicles carry liability coverage only. In addition, the district kept its contributions down due to a reduction in losses. The district paid \$120,043 in auto premiums in 2002–03. By participating in the risk pool, the district paid only \$62,482, a 48 percent savings over the former policy.

WORKERS' COMPENSATION

The district has significantly reduced its workers' compensation claims through innovative and well-structured risk management initiatives. Between 1999 and 2003, VISD reduced its number of claims by 36.9 percent and the average cost per claim by 70.7 percent. The number of claims dropped from 331 to 209 and the average claim cost dropped from \$3,047 to \$892. In reviewing the workers' compensation claims by worker classification, every class has experienced a decrease in the number of claims, the total amount of incurred claims, and the average cost per claim.

The district has initiated an aggressive return-to-work program to encourage employees to report for duty as soon as possible following an injury. There are currently only four active employees with lost time due to a work-related injury. The district stays in contact with injured employees and their physicians to develop a light duty return-to-work program as soon as it becomes feasible. Examples of return-to-work duties include, but are not limited to, the following:

- Security guards to man radios and provide an extra set of eyes on campuses,
- Librarian assistants, and
- Clerical aides.

Most injured workers want to return to work. Recent national research shows that most workers will return to their jobs early in their recovery period if their employers have a return-to-work program. Research also indicates that there is only a 50 percent chance an injured employee will be able to return at all if the employee misses six months of work. Injured employees who are out for a year return in only 25 percent of such cases, and employees who

are out for two or more years have little potential to return to work.

Studies have shown that employers who have return-to-work programs had a lower rate of lost workday cases, a reduction in workers' compensation claims, and fewer lost workdays per 100 employees. Effective return-to-work programs include coordinated, supportive, company-based methods. Employees who participate in such programs successfully return to work, typically at their pre-injury pay rate. These programs reduce claims, lower premium and litigation expenses, and improve the employer's public image.

SHELTER-IN-PLACE

The district has initiated a Shelter-in-Place Program at Guadalupe Elementary to ensure that all staff and students will be well protected in the event of a disaster. The primary purpose of the Shelter-in-Place plan of action is to protect district staff and students from hazardous chemical fumes that might result from an accidental spill at the local chemical plant or in a railroad car or truck carrying hazardous chemicals. However, the Shelter-in-Place program can be easily modified to protect students and staff in the event of any type of disaster requiring protection from outside contaminants or dangers. Specific tasks have been assigned to team members to ensure that the process runs smoothly and everyone is well protected. The district has conducted a mock disaster drill to test the effectiveness of the plan. The program is a clear demonstration of the priority the district has assigned to ensuring the safety of every VISD student and staff member in the aftermath of a chemical spill or disaster.

DETAILED FINDINGS

EMPLOYEE HEALTH INSURANCE (REC. 89)

The district has not defined an acceptable level of risk for its self-funded healthcare plan. VISD has been unsuccessful in developing effective strategies to respond to escalating health insurance costs, making it vulnerable to being unable to fully fund claims. The district has hired a third party administrator to manage and administer the plan. The premiums paid by VISD employees and the district's contributions are not sufficient to cover the cost of the plan. VISD has implemented cost controls that include, but are not limited to, the following: utilization management, a provider network, and a three-tier prescription drug plan. Despite district efforts, costs continue to escalate, placing VISD at risk of funding claims from the general operating fund balance.

Employee benefits are under the supervision of the chief financial officer, with daily oversight of the health care plan by the payroll supervisor. Two payroll clerks assist the supervisor in these duties.

The district has purchased stop loss coverage through AIG Life Insurance Company/Medical Excess. The stop loss coverage limited annual claims paid from the health insurance fund for the year ending August 31, 2003 to \$150,000 for any individual (four individuals had individual stop loss coverage ranging from \$235,000 to \$315,000) and \$8,666,000 for aggregate claims. The insurance company paid \$638,159 in aggregate stop loss claims during the year ending August 31, 2003.

One risk facing any self-insured health plan is the potential of claims exceeding revenue sources, which include premium payments made by the district and employees. If the plan is under-funded, the district must transfer additional funds to pay claims. **Exhibit 11-1** illustrates the financial performance of both the health insurance fund and the workers' compensation fund from 1998–2000 through 2002–03. Twice during the period reviewed, funds from the self-insured workers' compensation fund were transferred into the health insurance fund to cover claims.

As indicated in **Exhibit 11-2**, the district has experienced a 73.1 percent increase in paid claims in 2003–04 over those reported in 1999–2000. The largest percentage increase is in prescription drugs. The three-tier prescription plan was implemented in an effort to control costs. Medical, dental, and vision claims all continue to increase. Enrollment continues

to grow, with the exception of the alternate plan, which has experienced a decline of 29.7 percent.

Exhibit 11-3 summarizes the 2003–04 contribution rates for the district's health plan. The rates remained at 2002–03 levels.

As demonstrated in **Exhibit 11-4**, the cost of the health care plan has increased by 69.1 percent over the last five years, with the average cost per employee rising by 54.4 percent. As shown in **Exhibits 11-3 and 11-4**, the premium collected for employee-only coverage, which ranges from \$271.67 to \$322.70, does not cover the cost of the plan. The supplemental dependent coverage does not have an adequate number of participants to make up the difference.

VISD PLAN OPTIONS

The district provides two medical plan options to its employees. **Exhibit 11-5** summarizes the benefits and deductibles of each plan.

TRS ACTIVECARE PLAN

The Teacher Retirement System (TRS) offers fully insured health care plans to school districts. TRS ActiveCare plans 1, 2, and 3 are available through Blue Cross and Blue Shield of Texas in every county in the state. VISD is currently reviewing its employee benefits plan and considering options ranging from retaining to replacing the current self-funded health care plan. One option under consideration is the TRS ActiveCare plan. **Exhibit 11-6** summarizes ActiveCare benefit plans, deductibles, and premiums for 2003–04.

**EXHIBIT 11-1
VISD INTERNAL SERVICE FUNDS
1998-99 THROUGH 2002-03**

	1998-99	1999-2000	2000-01	2001-02	2002-03	5 YEAR % CHANGE
Health Insurance Fund						
Revenues	\$4,645,919	\$5,087,868	\$7,150,292	\$6,658,422	\$11,082,164	138.5%
Expenses	\$5,546,345	\$6,229,912	\$6,679,067	\$8,053,065	\$9,774,232	76.2%
Surplus (Deficiency)	(\$900,426)	(\$1,142,044)	\$471,225	(\$1,394,643)	\$1,307,932	-245.3%
Interest Income	\$79,626	\$66,076	\$38,649	\$5,687	\$4,693	-94.1%
Transfers in		\$500,000		\$900,000		
Beginning Fund Balance	\$1,524,013	\$703,213	\$127,245	\$637,119	\$148,163	-90.3%
Ending Fund Balance	\$703,213	\$127,245	\$637,119	\$148,163	\$1,460,788	107.7%
Workers' Compensation Fund						
Revenues	\$899,972	\$1,025,405	\$1,492,385	\$1,550,332	\$1,070,156	18.9%
Expenses	\$963,640	\$1,075,382	\$943,649	\$645,278	\$638,497	-33.7%
Surplus (Deficiency)	(\$63,668)	(\$49,977)	\$548,736	\$905,054	\$431,659	-778.0%
Interest Income	\$116,788	\$86,974	\$106,809	\$49,120	\$28,582	-75.5%
Transfers out		(\$500,000)		(\$900,000)		
Beginning Fund Balance	\$1,116,054	\$1,169,174	\$706,171	\$1,361,716	\$1,415,890	26.9%
Ending Fund Balance	\$1,169,174	\$706,171	\$1,361,716	\$1,415,890	\$1,876,131	60.5%

SOURCE: VISD, CAFR, For the Years Reported.

**EXHIBIT 11-2
VISD HEALTH INSURANCE CLAIM HISTORY
1999-2000 THROUGH 2003-04**

	1999-2000	2000-01	2001-02	2002-03	2003-04	5 YEAR % CHANGE
Plan Benefits Paid						
Medical Claims - Plan A	\$3,016,974	\$3,748,071	\$5,041,807	\$5,545,679	\$6,279,254	108.1%
Medical Claims - Plan B	801,262	549,632	516,080	745,821	703,941	(12.1%)
Medical Claims - Alt. Plan C	41,476	29,813	30,460	26,817	19,980	(51.8%)
Dental Claims	352,095	375,674	352,307	462,817	419,002	19.0%
Prescription Claims	877,596	873,167	956,879	1,230,541	1,409,135	60.6%
Vision Claims	30,632	40,064	33,713	35,132	33,691	10.0%
Total Paid	\$5,120,035	\$5,616,421	\$6,931,246	\$8,046,807	\$8,865,003	73.1%
Number of Claims						
Number of Medical Claims	18,627	23,326	22,652	28,145	29,535	58.6%
Number of Dental Claims	3,747	3,785	3,663	4,317	3,885	3.7%
Number of Vision Claims	511	575	468	619	582	13.9%
Enrollment (Medical)						
Employee - All	1,521	1,554	1,576	1,660	1,664	9.4%
Spouse	63	71	80	85	91	44.4%
Child	182	183	170	197	209	14.8%
Family	69	63	65	67	79	14.5%
Alternate Plan	629	629	611	514	442	(29.7%)
Total Enrollment	2,464	2,500	2,502	2,523	2,485	0.9%
Paid Claims by						
Employee	\$3,365,669	\$4,737,640	\$5,727,429	\$6,226,153	\$7,239,239	115.1%
Spouse	421,201	429,540	693,371	1,016,519	679,835	61.4%
Child	297,783	449,243	510,646	746,176	945,929	217.7%
Total Paid	\$4,084,653	\$5,616,423	\$6,931,446	\$7,988,848	\$8,865,003	117.0%
Claim Performance/Offsets						
Charges Submitted	\$8,185,916	\$11,100,082	\$13,245,073	\$17,762,941	\$19,313,514	135.9%
Paid Claims	5,120,035	5,616,421	6,931,246	7,900,165	8,865,003	73.1%
Exclusions & Ineligible	3,019,695	4,127,499	4,986,169	8,136,708	8,832,621	192.5%
Major Med Deductible	425,821	498,984	436,455	486,467	473,139	11.1%
Amt Subject to Co pay	610,599	790,903	778,845	888,778	1,008,546	65.2%
COB & Medicare Savings	\$ 45,148	\$ 63,981	\$ 30,831	\$ 27,377	\$ 26,638	(41.0%)

SC11036: VISD Health Insurance Claims Report: 1999-2000 through 2003-04 Policy Years

Each district is required to contribute a minimum of \$150 per month per active TRS member. The state contributes \$75 per month per active member. In addition, \$500 per year in supplemental compensation is provided by the state to help offset the cost of health coverage for non-professional staff. Those serving in an administrative capacity and those receiving annual compensation for TRS purposes in excess of \$50,000 (except for teachers) do not qualify for the supplemental compensation.

As demonstrated in **Exhibit 11-3**, VISD currently pays \$225 towards the monthly employee-only premium, with current employee contributions of \$46.67 and \$97.70 for the respective plan options. Employee-only premiums for the TRS plan are summarized in **Exhibit 11-6**. If VISD's current level

of contribution continues and the district elects to join the TRS ActiveCare plan, monthly premiums paid by employees would be approximately \$24, \$106, and \$194, respectively.

COST CONTAINMENT BEST PRACTICE

Collier County School District (CCSD) in Florida has been proactive in finding ways to keep the costs of benefits affordable. It has developed an innovative and cost-effective benefits plan. CCSD undertook a number of initiatives in its employee benefit functions to protect the district against catastrophic loss and contain costs in an environment of escalating health care costs and risk, estimating that it will be able to bring its health costs down by 30 percent. Each year, CCSD reevaluates whether its self-insurance program is more cost effective than a

EXHIBIT 11-3
HEALTH INSURANCE CONTRIBUTION RATES
2003-04

CATEGORY	MONTHLY RATE	MONTHLY DISTRICT CONTRIBUTION	MONTHLY EMPLOYEE CONTRIBUTION	CONTRIBUTION FOR DEPENDENT
PLAN A (\$300 DEDUCTIBLE WITH PRESCRIPTION CARD)				
Employee Only	322.70	225.00	97.70	N/A
Employee/Spouse	596.54	225.00	371.54	273.84
Employee/Children	512.26	225.00	287.26	189.56
Employee/Family	765.17	225.00	540.17	442.47
PLAN B (\$500 DEDUCTIBLE, NO PRESCRIPTION CARD)				
Employee Only	271.67	225.00	46.67	N/A
Employee/Spouse	494.85	225.00	269.85	223.18
Employee/Child(ren)	425.40	225.00	200.40	153.73
Employee/Family	633.82	225.00	408.82	362.15
ALTERNATE PLAN (FOR EMPLOYEES WITH GROUP MEDICAL COVERAGE ELSEWHERE)				
Employee Only	93.07	83.07	10.00	N/A

SOURCE: VISD, Payroll Department, 2003-04.

EXHIBIT 11-4
VISD HEALTH INSURANCE PLAN COSTS
1999-2000 THROUGH 2003-04

	1999-2000	2000-01	2001-02	2002-03	2003-04	5 YEAR % CHANGE
Paid Claims	\$5,120,035	\$5,616,421	\$6,931,246	\$7,900,165	\$8,865,003	73.1%
Administration Fees	178,556	358,243	207,426	228,098	225,277	26.2%
Flex Admin Fee	2,826	2,714	3,043	2,965	3,676	30.1%
PCS Admin Fee	18,353	-	-	-	-	N/A
Pre-Cert Fee	36,296	43,825	44,431	45,781	46,911	29.2%
PPO Fee	58,981	60,609	61,478	64,281	64,877	10.0%
Broker Fee	-	-	1,649	-	-	N/A
Cost Subtotal	5,415,047	6,081,812	7,249,273	8,241,290	9,205,744	70.0%
Reimbursement Stop/Loss	105,294	195,923	1,017,992	255,216	225,242	113.9%
Reimbursement Subrogation	41	62,289	-	-	-	N/A
Offset subtotal	105,335	258,212	1,017,992	255,216	225,242	113.8%
Net Cost of Plan	5,309,712	5,823,600	6,231,281	7,986,074	8,980,502	69.1%
Avg. Monthly Cost per Employee	\$291.46	\$312.27	\$329.58	\$400.85	\$449.88	54.4%

SOURCE: VISD Health Insurance Claim Report, 1999-2000 through 2003-04 Plan Years.

fully insured program. The Employee Benefits Committee reviews the cost of providing the same benefits to employees as the previous year and determines if changes to the plan must be made to ensure its financial viability.

The district's benefits committee includes representatives from all employee unions. This practice allows the unions to see the actual cost of benefits and potential cost increases and creates greater buy-in to negotiated benefits. With the help of its insurance consultant, the district has identified medical claims trends and developed strategies to

reduce claims costs and further wellness among its employees.

VISD should determine and define as policy an acceptable level of risk for operation of a self-funded health care plan. The district should research and identify methods to keep the self-funded plan solvent, join the TRS ActiveCare plan, and/or conduct an expanded market search for private insurers willing to offer a traditional health insurance product to the district. Opportunities to reduce healthcare costs may include partnering with other public entities to raise buying power and implementing disease management programs.

**EXHIBIT 11-5
HEALTH INSURANCE PLAN
2003-04**

BENEFIT	VISD \$300 DEDUCTIBLE		VISD \$500 DEDUCTIBLE	
	NETWORK	NON-NETWORK	NETWORK	NON-NETWORK
Deductible				
Individual	\$300	\$300	\$500	\$500
Family	\$900	\$900	\$1,500	\$1,500
Coinsurance (Plan Pays after Deductible)	80% Network Charges	50% Allowable Charges	80% Network Charges	50% Allowable Charges
Office Visit Co pay	\$20.00	Deductible & Coinsurance	Deductible & 80% Coinsurance	Deductible & 50% Coinsurance
Emergency Room	\$75 Co pay (Waived if Admitted)	\$75 Co pay (Waived if Admitted)	\$75 Co pay (Waived if Admitted)	\$75 Co pay (Waived if Admitted)
Hospital Admission	Deductible & Coinsurance	\$200 Admission Co pay, Deductible & 50% Coinsurance	\$100 Admission Co pay, Deductible & Coinsurance	\$200 Admission Co pay, Deductible & Coinsurance
Out-of-Pocket Maximum				
Individual	\$1,000	None	\$2,000	None
Family	\$3,000	None	\$6,000	None
Lifetime Maximum	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000

SOURCE: VISD, Payroll Department, 2003-04.

COORDINATION OF RISK MANAGEMENT FUNCTIONS (REC. 90)

The district’s risk management function is not well coordinated with employee benefits and lacks adequate oversight by the chief financial officer. Risk management requires significant financial resources and requires close oversight by the district’s financial management to ensure resources are available and expended appropriately. Currently, the risk manager reports to the director of Plant Maintenance & Purchasing. Although facilities management must be considered in the district’s risk management plan, it is unusual to maintain the function in this department.

VISD’s risk manager is responsible for managing the district’s self-insured workers’ compensation program as well as the district’s property and liability coverage. The district’s payroll supervisor oversees employee benefits, which include the district’s self-insured health plan. This separation of risk management functions across departmental lines impedes the district’s ability to coordinate all employee benefit products that include workers’ compensation and healthcare.

Many school districts consolidate their employee benefit functions, including workers’ compensation as components of the Risk Management Office, reporting either to the director of Human Resources or to the chief financial officer. The risk management coordinator at Laredo Independent School District (LISD) manages multiple employee benefits and risk

exposures via the procurement and maintenance of numerous benefits and insurance products. Under this structure, LISD has been able to maintain acceptable levels of claims, premiums, claim costs, and/or loss ratios. Health insurance premiums decreased 1 percent due to the 2003-04 drop in loss experience.

Given the cost associated with procuring and administering all risk management programs, it is important that a mechanism exist for communication between the chief financial officer and the risk management manager. **Exhibit 11-7** presents the proposed organizational structure for VISD’s risk management function.

The district should consolidate and centralize all employee benefits and risk management functions in the district and ensure coordination between the risk manager and the chief financial officer.

CAPITAL ASSET INVENTORY (REC. 91)

The district’s capital asset inventory policy and procedures for property custodians are inadequate; physical inventories are not performed consistently. There is no formal policy or procedure requiring campuses and departments to conduct an annual inventory, resulting in inconsistencies throughout the district. The warehouse supervisor conducts a physical inventory twice a year and reconciles the warehouse inventory to the general ledger. During focus groups, most principals indicated that they do perform inventory every year. They request a listing

**EXHIBIT 11-6
TRS ACTIVECARE HEALTH INSURANCE PLAN
2003-04**

	ACTIVECARE 3			
	ACTIVECARE 1	ACTIVECARE 2	NETWORK	NON-NETWORK
Medical				
Deductible				
Individual	\$1,000	\$500	N/A	\$500
Family	\$3,000	\$1,500	N/A	\$1,500
Coinsurance (Plan Pays after Deductible)	80% Network/ 60% of Non-Network Charges	80% of Network/ 60% of Non-Network Charges	85% of Network Charge	65% of Allowable Charges
Office Visit Primary/ Specialist Copay	Deductible and coinsurance	\$25/\$35 Deductible and Coinsurance Non-Network	\$20/\$30	Deductible and coinsurance
Emergency Room	Deductible and coinsurance	Deductible and coinsurance	\$50 Copay (Waived if admitted)	Deductible and coinsurance
Hospital Admission	Deductible and coinsurance	Deductible and coinsurance	Coinsurance	Deductible and coinsurance
Out-of-Pocket Maximum (In addition to deductible)				
Individual	\$2,000	\$2,000	\$1,000	\$3,000
Family	\$6,000	\$6,000	None	None
Lifetime Maximum	Unlimited	Unlimited	Unlimited	\$1,000,000
Prescription Drugs				
		Network	Non-Network	
<i>Retail</i>	Deductible and coinsurance (Discount card included.)			
Generic		\$10	\$10	\$10
Brand Copay (Formulary)		\$25	\$25	\$25
Brand Copay (Non-formulary)		\$45	\$45 (Patient also pays amount over network cost.)	\$40 (Patient also pays amount over network cost.)
<i>Mail Order</i>	Deductible and coinsurance (Discount card included.)			
Generic		\$20	N/A	\$20
Brand Copay (Formulary)		\$50	N/A	\$50
Brand Copay (Non-formulary)		\$90	N/A	\$80

Monthly Cost

Note: The rates presented are for the total monthly premium year for each plan.

	ACTIVECARE 1	ACTIVECARE 2	ACTIVECARE 3
Employee Only	\$249	\$331	\$419
Employee Plus Spouse	\$566	\$753	\$952
Employee Plus Child(ren)	\$396	\$527	\$667
Employee Plus Family	\$623	\$828	\$1,047

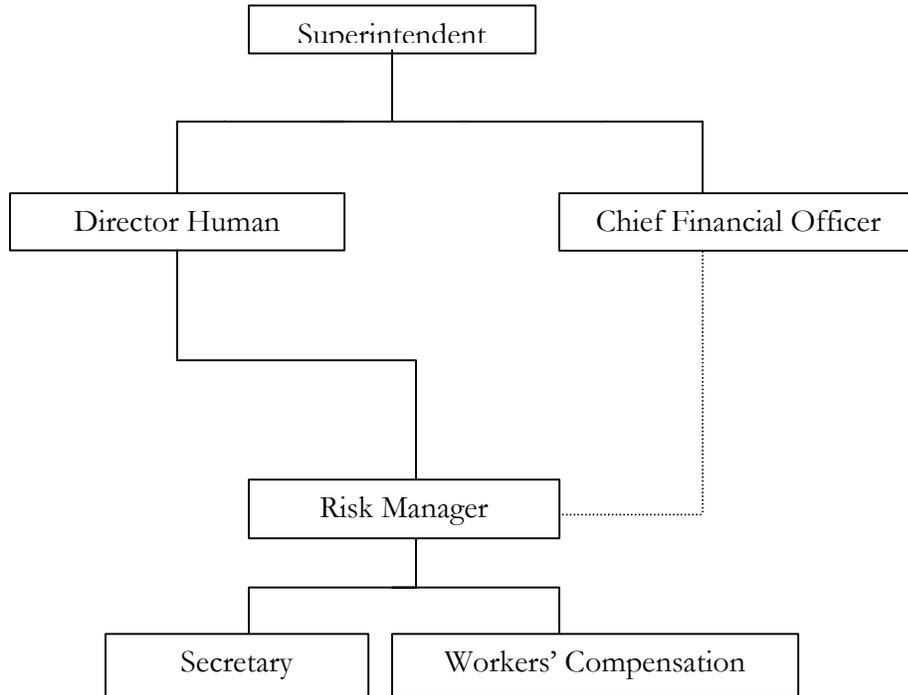
SOURCE: www.trs.state.tx.us/TRS-ActiveCare

of the items on their campus from the staff accountant and have each teacher inventory his/her classroom. However, not every principal requests an annual inventory. When an inventory is conducted, there is no mechanism in place to ensure physical counts are correct. Business and Finance staff do not

perform random checks but instead depend on the external auditor.

The Financial Accountability System Resource Guide (FASRG) defines capital assets as tangible in nature with a life expectancy of more than one year, of significant financial value, and reasonably identified

**EXHIBIT 11-7
PROPOSED ORGANIZATION STRUCTURE
VISD RISK MANAGEMENT DEPARTMENT**



SOURCE: Gibson Consulting Group, Inc.

and controlled through a property management system. VISD’s fixed asset threshold is \$500.

The district does not ensure that all capital assets are tagged when received. Each item is given an asset number when entered into the system; however, this number does not appear on the item. This makes it difficult to accurately monitor and track capital assets. Some departments, such as Management Information Systems, do tag capital assets, and Chandler Elementary has purchased a bar code scanning system, but there is no consistency across the district.

The FASRG provides guidelines to districts regarding fixed assets. These guidelines assist districts with developing and maintaining an asset tracking system. Effective management requires the involvement of key individuals throughout the school system.

Effective capital asset management systems require careful planning, especially if assets are located across multiple facilities, as is the case in most school districts. A successful inventory process includes timelines, methods for determining campus and department assignments, selection of staff who will

perform the inventory, levels of individual responsibility, estimated completion times, count verification, and training protocols. Many school districts use bar code scanner systems to more easily maintain and monitor its capital asset base. A bar code scanner system provides the district with a mechanism to label all capital items, streamlines the physical counting process, and automatically exports changes to the capital asset subsidiary system. It also allows districts to perform annual inventories.

The district should require capital assets to be inventoried annually, properly identified, monitored, and safeguarded. Property custodians should be required to sign an acknowledgement statement after being trained on the policies and procedures. Procedures should include timelines, methods for determining assignments, staff selection, responsibilities, estimated completion times, and inventory protocols.

Purchasing bar-code readers and software should streamline VISD’s inventory control function. To safeguard assets and effectively increase the efficiency of physical inventory procedures, property custodians should be instructed to attach bar-code tags to all capital assets during the next physical

inventory. Purchase of a bar code scanner system will cost the district approximately \$3,324, with an annual supply cost of \$17 for additional tags.

ACCOUNTABILITY OF PROPERTY CUSTODIANS (REC. 92)

VISD does not hold its property custodians accountable for damaged, lost, or stolen property. Although principals and department heads are assigned responsibility for the custody and safekeeping of the district's capital assets, they face no consequences for missing items. Items are occasionally moved to a different location without completion of the proper paperwork. As a result, the district does not always have adequate records on capital assets and cannot always distinguish whether assets have been moved from one location to another, discarded due to obsolescence, or are damaged, missing, or stolen.

Districts that have control over capital assets are those that assign responsibility to specific individuals and hold them accountable for any missing assets or other discrepancies. In Hillsborough County, Florida, the district has instituted strong asset control measures. The principal of every school receives an asset listing at the beginning of the year. At the end of the year, a physical inventory is taken and the results are compared to the asset listing from the beginning of the year. If there are any items missing, the proper paperwork should have been filed. This paperwork includes either a transfer form indicating that the asset has been transferred to another site or a Property Loss/Damage Report (PDR). If the proper paperwork is not filed for missing assets, principals are held accountable for replacement of the items. Often this entails having to use already limited school dollars to fund replacement of the items. By assigning responsibility directly to the custodian of the assets and providing an incentive to effectively track assets, the district significantly reduced the number of missing items.

VISD should assign responsibility for assets to principals and department heads and hold them accountable. VISD should enforce the policy by assigning assets from a master list to each school at the beginning of the year. If any item from the signed list is missing without proper authorization and proper documentation of sale, donation, or obsolescence, the chief financial officer should deduct the asset value from the next year's budget request for that school or department.

ACTIVITY FUNDS (REC. 93)

The district's decentralized activity fund structure and excessive number of activity funds, make it difficult to ensure consistency and control of the

funds. A total of 22 separate bank accounts are maintained at the district's depository bank. While the central office is responsible for reconciling all 22 accounts, including transaction activity of high school activity funds, each elementary and middle school is responsible for the transaction activity of their individual activity funds.

At the elementary and middle school campuses, the principal's secretary maintains cash and account inflows and outflows. These transactions are posted to a stand-alone software package. At the end of every month, the secretary forwards a transaction listing to the central office so that the bank reconciliation can be completed.

High school activity fund transactions run through the general operating account. High school staff complete requisitions for purchases or reimbursements, with payment made through the centralized accounts payable process.

In San Antonio ISD (SAISD), accounting for student activity funds is centralized. All funds are deposited into a single checking account for school activity funds and reconciled each month at the central office. Interest earned on the funds is credited to each campus' account.

SAISD has a detailed accounting manual and a sponsor manual that cover all aspects of student activity funds. The manuals were developed to provide detailed information about the student activity funds. The accounting manual identifies all accounting codes required to accurately record the student activity funds and expenditures. Both manuals include all the rules about what student activity funds can be used for, what is allowed and what is not allowed, and identify multiple "what-if" scenarios for the use of student activity funds. Included in the manuals are instructions for principals and clerks as to what can be accepted from sponsors. Examples of forms and their associated instructions can be found in the manual for easy reference. There are also instructions for how records are to be maintained. Contact names and numbers are also provided in the manuals. Each principal on every campus is given a manual.

VISD should consolidate and centralize all activity fund accounting and post all activity fund transactions through the general operating account. By centralizing the process the district can ensure that standard procedures are followed, thus maintaining stronger control over the funds. The likelihood of "emergency" payments is reduced when all staff must follow districtwide processes. The staff accountant should be responsible for maintaining

this account, under the direct supervision of the chief financial officer.

Deposit slips, related receipts, and/or copies of checks should be forwarded to the Business and Finance Department the first business day following a deposit. All checks should be distributed from the Business and Finance Department. Since most school functions are planned weeks or months in advance, there is usually adequate time to go through the requisition process for expenditures. However, campuses should be allowed to keep \$250 in petty cash locked in the campus business office for emergency situations.

SAFEGUARDING CHECKS AND PAYMENTS (REC. 94)

The district does not maximize its armored car service to include payroll checks and other payments being sent to and from the Business and Finance Department. Payroll checks are sent in a bright red color-coded envelope through inter-office mail to schools and departments putting the district at risk for theft. Attached to the envelope is a multi-part receipt to be signed by the carrier and the receiving school or department. Accounts receivable payments are sent from schools or departments in the same manner.

The district has an armored car service available to every campus to protect cash resources and staff. Many districts expand the duties of the armored car drivers to include delivering checks between the central office and campuses. This ensures that adequate security is in place and protects the district from loss.

VISD should expand the duties of the armored car service to include delivering payroll checks and receivables between the central office, schools, and departments. The armored car driver should begin the route at the central office on pay dates to pick up checks for delivery to the campus business offices. On a daily basis, the route should end at the central office so the driver can deliver receivables to the Business and Finance Department. Use of the red color-coded envelopes should be discontinued immediately. Plain sealed envelopes should be utilized and the current receipting process continued. Revising the pickup and delivery schedules of the armored car service is not expected to result in additional costs to the district.

For background information related to Asset and Risk Management, see p. 249 in the General Information section of the Appendices.

FISCAL IMPACT

RECOMMENDATION		2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
CHAPTER 11: ASSET AND RISK MANAGEMENT								
89.	Determine and define as policy an acceptable level of risk for operation of a self-funded health care plan.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
90.	Consolidate and centralize all employee benefit and risk management functions under the risk manager and ensure coordination with the chief financial officer.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
91.	Establish a comprehensive capital asset management process, purchase a bar code scanner system to tag all capital items upon receipt, and streamline the inventory process.	\$0	(\$17)	(\$17)	(\$17)	(\$17)	(\$68)	(\$3,324)
92.	Ensure the protection of district assets by assigning responsibility for capital assets to principals and department heads and hold these individuals accountable for the assets in their custody.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
93.	Consolidate the 22 activity funds, centralize all activity fund accounting and post all activity fund transactions through the general operating account.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
94.	Expand the duties of the armored car service to include delivering payroll checks and receivables between the central office, schools, and departments.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Totals-Chapter 11		\$0	(\$17)	(\$17)	(\$17)	(\$17)	(\$68)	(\$3,324)

CHAPTER 12

FOOD SERVICE

The primary mission of a school district's food service program is to provide an appealing and nutritionally-sound breakfast and lunch to students, while operating on a cost-recovery basis. In addition, these meals should be provided to the students in a safe, clean, and accessible environment. Several success factors can be used to measure the efficiency and evaluate the effectiveness of a school district's food service operation. These factors include a high ratio of meals per labor hour (MPLH), minimizing food costs and waste, maximizing student participation in breakfast and lunch programs, providing a variety of meal choices that meet or exceed nutritional standards, reducing the length of time students must wait in line for service, and operating a financially self-sufficient program.

Currently, there are 15 elementary schools, three middle schools, and two high school campuses with cafeterias. Chandler Elementary serves as a finishing kitchen for three satellite kitchens at the Mitchell Guidance Center, the Profit Academic Center, and the Juvenile Center for Academic Achievement (JCAA).

During 2002–03, 1,645,146 lunches and 558,565 breakfasts were prepared. Fifty-three percent of the district's students are economically disadvantaged. Meal participation rates for elementary, middle, and high schools vary considerably. In 2003–04, breakfast participation at VISD was 27.5 percent at the elementary schools, 11.9 percent at the middle schools, and 5.3 percent at the high school campuses. Lunch participation was 63.7 percent at the elementary schools, 49.8 percent at the middle schools, and 25.7 percent at the high school campuses.

Victoria Independent School District (VISD) participates in the National School Lunch Program (NSLP), School Breakfast Program (SBP), the After School Snack Program, and the Summer Feeding Program administered by the Texas Department of Agriculture (TDA). Districts that participate in the federal lunch program receive cash subsidies and donated commodities from the USDA for each eligible meal they serve. In return, the district must serve its students meals that meet federal guidelines for nutritional value and offer free or reduced-price meals to eligible students. Total revenues in 2002–03 were \$5,029,561 and total expenditures were \$4,867,543. Federal reimbursement dollars make up the majority of the Child Nutrition Department's revenue, comprising just over 66.4 percent of all revenue received. The state provides slightly more

than 1 percent of the total revenue. Local sources, including the cost of adult meals, a la carte sales, and special event catering, account for approximately 32.6 percent of the Child Nutrition revenue.

ACCOMPLISHMENTS

- VISD has created an internship position to provide dietary expertise without additional cost.
- VISD encourages and rewards staff for continuing education efforts and for a willingness to excel.
- VISD has designed an innovative addition to the menus posted on its Child Nutrition Department website to provide health and nutritional guidance to parents and students.

FINDINGS

- The meal equivalent conversion factor used by VISD is below industry standards, causing its meals per labor hour (MPLH) to be overstated.
- The Child Nutrition Department does not plan or budget effectively for replacing, maintaining, or repairing kitchen equipment.
- The Child Nutrition Department is not performing adequate preventive maintenance on food service equipment.
- The reports generated by the district's financial system, do not provide the director of Child Nutrition with information to easily track performance by each cafeteria.
- The district lacks aggressive strategies to increase breakfast participation.
- VISD fails to adequately enforce the existing board policy prohibiting the sale of competitive food during meal periods.
- The Child Nutrition Department's formal organization structure is not reflective of the functional management of the department.
- The district does not universally encourage meal pre-payment, with some campuses collecting lunch money in the classroom and selecting a student to deliver it to the cafeteria. This practice places the student in an unsafe situation.

RECOMMENDATIONS

- **Recommendation 95 (p. 158): Use the industry standard meal equivalent conversion factor and raise the district's**

meals per labor hour target based on the type of kitchen and number of meal equivalents served, and monitor staffing levels to ensure target is achieved. The conversion factors used by the district overstate the number of meal equivalents served each day and require higher staffing levels than necessary. The district should use the industry standard when establishing its MPLH targets to maximize efficiency in its kitchens and ensure the proper staffing levels are in place.

- **Recommendation 96 (p. 160): Develop a kitchen equipment replacement plan and budget accordingly.** By building its food service fund balance, the district can ensure that funds will be available to begin replacing its aging equipment. The district should determine which cafeterias have the greatest equipment replacement needs and develop a timeline to address those needs. The director of Child Nutrition should establish long-term equipment replacement needs, estimate cost by year, identify adequate revenue sources to cover the cost, and develop a five-year replacement plan.
- **Recommendation 97 (p. 162): Prepare a five-year preventive maintenance plan to increase the useful life of kitchen equipment.** A database should be created to track the scheduled dates for preventive maintenance. Data should also be collected to allow the district to analyze the impact, efficiency, and cost-effectiveness of its preventive maintenance program and identify areas that may need improvement. The program will require routine inspections, adjustments, and replacement of components on a routine basis. These activities should be scheduled throughout the year. The effectiveness of the program should be monitored and performance measures established to determine the district's progress.
- **Recommendation 98 (p. 162): Create management reports to track individual cafeteria performance.** VISD has access to participation data from its food service point-of-sale system. This system also tracks labor hours. Production reports can track food costs, as well as waste, by campus. The Child Nutrition Department should work with Management Information Systems (MIS) to create a database that can import all raw data from the various sources to create management reports for the director, providing current information that would allow timely adjustments to be made

when necessary and give the department a powerful budgeting and planning tool.

- **Recommendation 99 (p. 163): Implement a Breakfast-in-the Classroom breakfast option throughout the district to raise breakfast participation.** Many school districts have become conscious of the importance of providing breakfast to their students. Bus schedules also affect breakfast participation when students are not dropped off early enough to go through the serving line prior to the start of class. The Breakfast-in-the-Classroom program provides every student with the opportunity to participate in breakfast and derive the academic, and health benefits associated with eating a nutritious breakfast.
- **Recommendation 100 (p. 165): Strengthen the existing board policy to restrict competitive foods on campuses during meal periods.** Local school boards have the authority to restrict outside food items from campuses. The director of Child Nutrition should work with principals and school sponsors to develop and implement policies that restrict the sale of outside food items during the serving periods and ban fast food at all schools.
- **Recommendation 101 (p. 166): Clarify the Child Nutrition Department's organization to more accurately reflect the department's reporting hierarchy and duties.** As the assistant director has no supervisory responsibilities, this position should be downgraded to a coordinator. Under the new organization structure, each field supervisor will be responsible for assisting the director in menu planning and nutritional education. The organization chart should be updated to reflect the changes, and new job descriptions should be posted that define the duties of each position.
- **Recommendation 102 (p. 168): Encourage cafeteria meal pre-payment and eliminate the practice of allowing elementary students to deliver meal money to the cafeteria.** The district should abandon this practice immediately. There will be some resistance since many teachers use this as a type of reward for students. However, it is too dangerous and places the district in a vulnerable position if anything were to happen to the student between the classroom and the cafeteria. Students should prepay or bring their meal money directly to the cafeteria, either during breakfast to pay for the day's meals or each time they go through the line during the day.

DETAILED ACCOMPLISHMENTS

DIETARY INTERNSHIP

There are no registered dietitians on staff at VISD. To offset this situation, the director helped establish a three-week dietetic internship through a partnership with Texas A&M University – Kingsville (TAMU-Kingsville). The curriculum consists of eight modules:

- Menu preparation;
- Planning and production;
- Financial, physical, and safety management;
- Personnel management;
- Administrative duties and supervision of personnel;
- Specialized feeding issues;
- Professionalism, business communication, and leadership; and
- Preparing a notebook for VISD.

Each module contains specific activities that expose the intern to every aspect of a school foodservice program. The district uses the intern to help prepare special needs diets and review the nutritional content of its regular menu. In addition, the intern is placed in several school cafeterias across the district and provides valuable feedback to the director to ensure that proper procedures are being followed. There is no cost to the district for the program. When the district requires additional assistance, a nutritionist from TAMU-Kingsville can be consulted at a cost of \$75 an hour.

STAFF DEVELOPMENT AND STAFF RECOGNITION

VISD Child Nutrition strives to provide all employees the opportunity for staff development and recognizes top performers throughout the year. Every August, food service employees attend in-service workshops where administrators review safety issues, departmental procedures, district policies, marketing programs, time management, and job procedures.

The department tries to promote cafeteria managers from within, providing an incentive to lower level employees to stay with the district. Each Child Nutrition specialist is encouraged to attain certification from the Texas Association of School Nutrition (TASN). When the specialists pass levels I, III, and IV, they are raised one pay grade for each level. The TASN certification program progresses students from basic skills to managerial and administrative responsibilities. In addition, every specialist has the opportunity to join the VISD Manager Trainee Program. The program consists of intense training that prepares a specialist to become a

cafeteria manager. Once a candidate has been accepted into the program, they are raised to a pay grade 3, mid-point. Upon completion of the program, the specialist is reclassified as a Manager Trainee and raised to a pay grade 4, low mid-point. The trainees are available to fill in when cafeteria managers are absent. Hands-on experience is a key component of the training. There are currently six manager trainees in the department.

Victoria College offers required courses every semester for VISD Child Nutrition employees. Each student, as long as he or she is in good standing with the district, is reimbursed for any course they take and pass. Courses include the following:

- nutrition;
- quantity cooking;
- kitchen management;
- personnel management;
- sanitation; and
- safety.

The department has also instituted a “CAN DO” award for any Child Nutrition employee who exhibits the following traits:

- enthusiasm;
- positive attitude;
- quality customer service;
- eagerness to learn;
- job knowledge; and
- gives 100 percent.

When an employee wants to nominate a co-worker for a “CAN DO” award, he/she completes a nomination sheet that provides a description of what the co-worker has done to be recommended for the award. The completed form is then sent to the central office and a decision is made whether or not the actions are commendable. If the nominee is found to have taken steps above and beyond what would normally be expected, he or she is given a “CAN DO” pin.

INFORMATIVE MENUS

The department has designed a menu that is posted to the Child Nutrition website to provide nutritional information in an innovative and creative way. The district uses three color-coded symbols to quickly identify the nutritional value of each menu item and encourages students to *Eat Smart*. These symbols are:

- Green: Go
- ▽ Yellow: Slow
- ⬡ Red: Whoa

In addition, the district includes a box at the bottom of the menu that contains health tips. Two examples are:

- Advice for Today (October 2003 menu)
 - Help children get at least 60 minutes of physical activity daily.
 - Become physically active if you are inactive.
 - Maintain or increase physical activity if you are already active
 - Stay active throughout your life.
 - Choose physical activities that fit with your daily routine, or choose recreational or structured exercise programs.
- 10 Good Reasons to Exercise (April 2003 menu)
 - Build confidence;
 - Strengthen your heart;
 - Improve the quality of sleep;
 - Control your appetite;
 - Add years to your life;
 - Feel energized;
 - Build muscle;
 - Reduce body fat;
 - Reduce stress; and
 - Feel great.

Child Nutrition has become a critical issue for school food service programs given the increase in childhood obesity. It is estimated that 35 percent of Texas school age children are overweight or obese. Nationwide, childhood obesity has doubled in the last 20 years. By taking this opportunity to present health tips and facts, the VISD Child Nutrition Department is raising awareness of both parents and students.

DETAILED FINDINGS

MEAL EQUIVALENTS AND STAFFING LEVELS (REC. 95)

The meal equivalent conversion factor used by VISD and the district's meals per labor hour (MPLH) target of 12 are below industry standards. In order to calculate the MPLH, the meals being served by the district must be converted into meal equivalents. Industry analysts assume that each lunch served counts as a full meal equivalent. Breakfasts and ala carte items do not require the same degree of work as serving a full lunch and are therefore reduced by a measure of equivalency. The recommended conversion factor to convert breakfasts to one meal equivalent is 3 to 1. Ala carte sales are converted to meal equivalents by dividing the sales by a conversion factor; currently, the industry standard is

\$3.00. However, the industry standard for ala carte sales is based on the types of ala carte items sold, the preparation type required, and the number of serving lines. VISD offers the following items on its ala carte serving lines: hamburgers (prepared in-house); cheeseburgers (prepared in-house); chicken burgers (prepared in-house); burritos (pre-made and reheated); pizza (pre-made and reheated); taquitos (made from scratch); cookies (homemade); pastries (proof and heat); baked potatoes (cook and serve); submarine sandwiches (prepared in-house); hot pockets (pre-made and reheated); barbeque on a bun (prepared in-house); and chips, ice-cream, snack cakes, fruit, and drinks (stock and serve).

Given the high percentage of items that are prepared in-house, a conversion rate of \$2.00 is appropriate. **Exhibit 12-1** shows the conversion rate for meal equivalents currently used by VISD. By using this lower conversion factor, the district overstates the number of meal equivalents prepared each day and over staffs its kitchens.

EXHIBIT 12-1 CONVERSION RATE FOR VISD MEAL EQUIVALENTS 2003-04

CATEGORY	CONVERSION RATE
Lunch Meals	One lunch equals one equivalent
Breakfast Meals	One and one half breakfasts equal one equivalent
A la Carte Sales	Sales divided by \$1.75 equal one equivalent

SOURCE: VISD, director of Child Nutrition, April 2004.

There are two systems of meal preparation, the conventional and the convenience systems. The conventional system involves using raw ingredients in the preparation of meals, the use of some bakery bread and prepared pizza, and involves washing dishes. In contrast, the convenience system maximizes the amount of processed foods and disposable wares. VISD prepares both convenience and conventional entrees. The review team used the industry standards associated with the conventional system in evaluating the district's MPLH standards, as this is the most conservative approach.

Exhibit 12-2 outlines the MPLH industry standards used to evaluate staff productivity. If the MPLH rate is lower than the recommended rate, either the number of meals served is low or the number of hours worked is high. The number of hours worked is a function of two variables: the number of staff employed and the hours worked per worker. For schools with an MPLH below industry standards, a school food service operation would have to either increase the number of meals served or reduce the number of labor hours in order to achieve the

**EXHIBIT 12-2
INDUSTRY STANDARD RECOMMENDED MEALS PER LABOR HOUR**

NUMBER OF EQUIVALENTS	MEALS PER LABOR HOUR (MPLH)			
	CONVENTIONAL SYSTEM		CONVENIENCE SYSTEM	
	LOW PRODUCTIVITY	HIGH PRODUCTIVITY	LOW PRODUCTIVITY	HIGH PRODUCTIVITY
Up to 100	8	10	10	12
101-150	9	11	11	13
151-200	10-11	12	12	14
202-250	12	14	14	15
251-300	13	15	15	16
301-400	14	16	16	18
401-500	14	17	18	19
501-600	15	17	18	19
601-700	16	18	19	20
701-800	17	19	20	22
801-900	18	20	21	23
901 and up	19	21	22	23

SOURCE: School Foodservice Management for the 21st Century, 5th Edition.

recommended MPLH. VISD food service specialists work six-hour shifts, while cafeteria managers work eight.

The district has established a target of 12 MPLH in all cafeterias. However, it does not effectively monitor each cafeteria to respond to variances so that adjustments can be made to staffing levels to bring each cafeteria in line with the target. For an elementary school serving an average of 419 meal equivalents per day, the recommended MPLH range is 14 to 17. Secondary schools, given the increased number of serving and ala carte lines, four at the high school campuses and three at the middle school

campuses, usually require more staff than the standards would suggest. However, it is reasonable to expect that a secondary school serving just over 700 meal equivalents per day would easily meet the current MPLH target of 12 and could be expected to raise the target to 14 MPLH. **Exhibit 12-3** summarizes the average meal equivalents per day, the average number of daily labor hours, and the current MPLH, using the industry standard conversion rates, for each cafeteria in the district. Although many of the elementary schools meet or exceed the district's target of 12, the target is too low. None of the high schools meet the district's target.

**EXHIBIT 12-3
VISD EFFICIENCY STATISTICS
2003-04**

SCHOOL	AVERAGE MEAL EQUIVALENTS PER DAY	AVERAGE LABOR HOURS PER DAY	MPLH
Aloe Elementary	462.0	27.5	16.8
Chandler Elementary	446.6	60.3	7.4
DeLeon Elementary	402.9	31.5	12.8
Dudley Elementary	483.9	43.0	11.3
F.W. Gross Elementary	503.9	34.5	14.6
Guadalupe Elementary	121.1	14.5	8.4
Hopkins Elementary	465.3	34.0	13.7
Juan Linn Elementary	427.1	34.0	12.6
Mission Valley Elementary	197.8	18.0	11.0
O'Connor Elementary	674.2	37.3	18.1
Rowland Elementary	580.8	37.3	15.6
Shields Elementary	674.2	42.0	16.1
Smith Elementary	580.8	38.0	15.3
Vickers Elementary	432.3	34.0	12.7
William Wood Elementary	118.8	14.5	8.2
Average Elementary School	438.1	27.6	13.0
Crain Middle School	955.2	66.5	14.4
Howell Middle School	862.0	77.0	11.2
Patti Welder Middle School	999.5	81.0	12.3
Average Middle School	938.9	74.8	12.6
Memorial H.S. Stroman Campus	1,417.4	126.5	11.2
Memorial H.S. Senior Campus	806.2	106.0	7.6
Average High School	1,111.8	116.3	9.4

SOURCE: VISD, Child Nutrition Department, 2003-04 Employee Schedule and Financial Reports – Meal Counts by Day.

VISD should use the industry standard meal equivalent conversion factor and raise the district's meals per labor hour target based on the type of kitchen and the number of meal equivalents served, and monitor staffing levels to ensure the target is achieved. The district should use the industry standard when establishing its MPLH targets to maximize efficiency in its kitchens and ensure the proper staffing levels are in place. Staffing levels at each cafeteria should be evaluated at the end of December, using the industry standard conversion factor to determine the number of meal equivalents served. If a cafeteria does not meet the MPLH targets, staffing levels should be modified by reducing the number of hours each food service specialist works each day. **Exhibit 12-4** compares the current number of labor hours worked at each cafeteria with the number of hours required to meet the industry standard MPLH.

It should be noted that any savings realized from a reduction in staffing hours in the Child Nutrition Department would result in an increase to the food services fund balance and not to the general fund. Food service operations are federally subsidized and the use of these proceeds is restricted under federal law to be used only to fund Food Service operations, including equipment purchases.

Implementing this recommendation should save the food service fund a total of \$229,195 in annual salaries as detailed in **Exhibit 12-5**. Additionally, the

district should see cost savings in variable benefits. The cost savings to the district's food service fund result from decreased labor hours not from staff reductions; therefore, health insurance is not included in the calculation as benefit savings. Variable benefits include: Medicare (1.45%), workers' compensation (7.289%), and TRS (0.4%) for a total of 9.139% of total salary. Therefore the district would save \$20,946 in variable benefits (\$229,195 x 0.09139).

The district would save a total of \$250,141 annually by implementing this recommendation (\$229,195 in salaries + \$20,946 in variable benefits). The change in staffing levels will not be implemented prior to January 2005; therefore, the savings will only be realized for eight months in the first year, totaling \$166,761 (\$250,141/ 12 months x 8 months).

PLANNING AND BUDGETING FOR EQUIPMENT NEEDS (REC. 96)

The Child Nutrition Department does not plan or budget effectively for replacing, maintaining, or repairing kitchen equipment. Most of the kitchen equipment in the district is old and outdated. Since a large percentage of the district's kitchen equipment is approximately the same age, the risk exists that it may all have to be replaced at one time. There is no contingency plan in the budget to pay for a large-scale equipment replacement.

EXHIBIT 12-4 COMPARISON OF VISD CAFETERIA STAFFING LEVELS TO INDUSTRY STANDARD 2003-04

SCHOOL	MEAL EQUIVALENTS PER DAY	CURRENT LABOR HOURS PER DAY	INDUSTRY STANDARD LABOR HOURS PER DAY	EXCESS DAILY LABOR HOURS
Aloe E.S.	462.0	27.5	28.9	0.0
Chandler E.S.	446.6	60.3	27.9	32.4
DeLeon E.S.	402.9	31.5	25.2	6.3
Dudley E.S.	483.9	43.0	30.2	12.8
F.W. Gross E.S.	503.9	34.5	31.5	3.0
Guadalupe E.S.	121.1	14.5	7.6	6.9
Hopkins E.S.	465.3	34.0	29.1	4.9
Juan Linn E.S.	427.1	34.0	26.7	7.3
Mission Valley E.S.	197.8	18.0	12.4	5.6
O'Connor E.S.	674.2	37.3	37.1	0.2
Rowland E.S.	580.8	37.3	34.4	2.9
Shields E.S.	674.2	42.0	42.1	0.0
Smith E.S.	580.8	38.0	36.3	1.7
Vickers E.S.	432.3	34.0	27.0	7.0
William Wood E.S.	118.8	14.5	7.4	7.1
Crain M.S.	955.2	66.5	68.2	0.0
Howell M.S.	862.0	77.0	61.6	15.4
Patti Welder M.S.	999.5	81.0	71.4	9.6
Memorial H.S. Stroman Campus	1,417.4	126.5	101.2	25.3
Memorial H.S. Senior Campus	806.2	106.0	57.6	48.4
Total	11,612.0	957.4	763.8	196.8

SOURCE: VISD, Child Nutrition Department, 2003-04 Employee Schedule and Financial Reports - Meal Counts by Day.

EXHIBIT 12-5
FISCAL IMPACT OF REVISING MPLH STANDARDS

SCHOOL	EXCESS DAILY LABOR HOURS	AVERAGE HOURLY RATE	NUMBER OF DAYS WORKED	SALARY SAVINGS
Aloe E.S.	0.0	\$6.47	180	\$0
Chandler E.S.	32.4	6.47	180	37,733
DeLeon E.S.	6.3	6.47	180	7,337
Dudley E.S.	12.8	6.47	180	14,907
F.W. Gross E.S.	3.0	6.47	180	3,494
Guadalupe E.S.	6.9	6.47	180	8,036
Hopkins E.S.	4.9	6.47	180	5,707
Juan Linn E.S.	7.3	6.47	180	8,502
Mission Valley E.S.	5.6	6.47	180	6,522
O'Connor E.S.	0.2	6.47	180	233
Rowland E.S.	2.9	6.47	180	3,377
Shields E.S.	0.0	6.47	180	0
Smith E.S.	1.7	6.47	180	1,980
Vickers E.S.	7.0	6.47	180	8,152
William Wood E.S.	7.1	6.47	180	8,269
Crain M.S.	0.0	6.47	180	0
Howell M.S.	15.4	6.47	180	17,935
Patti Welder M.S.	9.6	6.47	180	11,180
Memorial H.S. Stroman Campus	25.3	6.47	180	29,464
Memorial H.S. Senior Campus	48.4	6.47	180	56,367
Total Savings				\$229,195

SOURCE: Gibson Consulting Group, Inc., May 2004.

In 2003–04, the district budgeted \$8,000 for capital outlay. On April 1, 2004, the director of Child Nutrition sent a memorandum to the assistant superintendent of Administration requesting permission to budget for campus improvements. During summer 2004, the district spent \$56,753 to perform improvements to six cafeterias. In addition, the district needs to purchase six ovens, each at a cost of \$3,000. The director of Child Nutrition is seeking bids for a new walk-in refrigerator at Hopkins Academy, which will cost between \$20,000 and \$30,000. The potential cost of these requests total \$104,753. This is 1,309 percent more than the \$8,000 originally budgeted.

Polk County School District in Florida has a long-range plan for facility and equipment maintenance and replacement. The director, with input from cafeteria managers, maintenance staff, and the area supervisors, identifies equipment and facility needs for at least five years. These needs are reviewed and prioritized annually to maximize available funds. In addition, the district Food Service office tracks cafeteria maintenance project requests to identify and plan for future funding needs. This information is given to facilities/maintenance and incorporated into the district's five-year facilities and equipment plan.

VISD should develop a kitchen equipment replacement plan and budget accordingly. By building its food service fund balance, the district can ensure that funds will be available to begin replacing its aging equipment. An inventory of all food service equipment should be conducted to verify the purchase date of every item as well as any

maintenance that has been performed on the equipment since being put into operation. The district should determine which cafeterias have the greatest equipment replacement needs and develop a timeline to address those needs. Once the greatest needs have been dealt with, the district should establish a formal replacement plan for the remaining equipment. The plan should consider the following:

- general statement of need for replacement policy;
- replacement cycle based upon the average useful life of each major type of equipment;
- designation of usage levels to identify what exceptions exist for equipment that is heavily used and will require more rapid replacement;
- plan for redeployment of older equipment that can be used for a backup system or for replacement parts;
- established procedure for reviewing replacement policy; and
- standard specifications for equipment purchases.

To develop a workable and accurate budget that will allow the department to meet its current needs and ensure that funds are available to purchase equipment as part of a formal replacement plan and not in a reactive “must-have” mode, the director of Child Nutrition and the chief financial officer must understand the department's unique needs. It is important that they each understand the following:

- benefits of preparing a budget;
- factors that influence budgeting;

- methods of budgeting;
- budgeting process; and
- how to analyze and adjust the budget.

The director of Child Nutrition should establish long-term equipment replacement needs, estimate costs by year, identify adequate revenue sources to cover the costs, and develop a five-year replacement plan. The plan should be reevaluated on a regular basis to ensure it still meets the department's needs. It should be tied to the district's Master Facility Plan. The district should budget \$100,000 annually for equipment. This figure is based on the current purchase requests as well as the age of the current equipment.

PREVENTIVE MAINTENANCE (REC. 97)

The Child Nutrition Department is not performing adequate preventive maintenance on food service equipment and does not have a formal preventive maintenance program. Preventive maintenance programs are designed to increase the useful life of equipment with scheduled inspections, lubrication, part replacements, and repairs. Without preventive maintenance, emergency service tends to predominate, causing equipment to operate less efficiently. A high-quality preventive maintenance program should anticipate maintenance needs and notify the appropriate personnel of required maintenance and repairs to equipment and machinery.

A maintenance technician is dedicated to food service equipment needs at VISD. This individual reports to the Plant Maintenance Department but is paid from the Child Nutrition budget. Major repairs are outsourced, such as refrigeration systems, steam tables, and oven units. All maintenance activities are paid from food service funds.

Victoria, with its close proximity to the Gulf of Mexico, has a problem with corrosion. Another district in close proximity to the gulf is Brownsville Independent School District (BISD). The Coordinator for Equipment Procurement at BISD estimates corrosion cuts the useful life of equipment by one-half. By properly caring for the existing equipment with regularly scheduled inspections, small problems can be corrected before they become more serious and more expensive to fix.

San Angelo ISD (SAISD) plans maintenance projects over five years and maintains a database of the year's scheduled projects with the anticipated cost of the repair. The database also tracks the following items:

- Name and serial number of equipment;
- Age of equipment;

- Location of equipment;
- Desired operating characteristics;
- Date of last preventive maintenance;
- Date of next scheduled preventive maintenance;
- Any malfunctions discovered;
- Corrective actions taken; and
- Record of replacement parts.

A preventive maintenance five-year plan will provide the district the opportunity to budget both time and funds. It ensures staff is available and proper supplies are on hand to keep equipment operating at maximum performance levels. In addition, SAISD has implemented a forward maintenance crew that visits each school at least once per year to perform preventive maintenance and low priority work orders. The district should also track the actual cost of repairs in order to support and expedite the budget planning process.

VISD should prepare a five-year preventive maintenance plan to increase the useful life of kitchen equipment. Preventive maintenance activities should be scheduled throughout the year. VISD should monitor the effectiveness of the program and establish performance measures to determine the district's progress. The benefits of a maintenance program include reduced downtime for critical systems and equipment, extended life for facilities and equipment, improved equipment reliability, and an improved appearance in the facilities.

A preventive maintenance program has both labor and equipment costs. Actual costs are dependent on the extensiveness of the program. A five-year preventive maintenance plan would conservatively require the district to budget \$2,500 per cafeteria per year, for a total of \$50,000. This represents 1 percent of the department's budgeted revenues. At the end of the first year, the district should re-evaluate the costs of its program and revise its budget.

FINANCIAL REPORTING (REC. 98)

The reports generated by the district's financial system, Pentamation, do not provide the director of Child Nutrition with information to easily track performance by each cafeteria. Food and labor costs are not summarized by cafeteria to allow management the opportunity to respond quickly to variances. VISD has access to participation data from its food service point-of-sale system. This system also tracks labor hours. Production reports can track food costs, as well as waste, by campus.

An accounting system that provides accurate data on a timely basis is essential for management to be able to effectively manage the financial resources of the department. School food service departments are

expected to manage very tight budgets and must have access to timely financial information. Each cafeteria operates as an independent enterprise. Each cafeteria manager must monitor their own inventory, participation, food costs, plate waste, and labor costs. This task is difficult without an adequate reporting tool in place. Although a school food service operation is nonprofit, there must be adequate cash available to meet operating expenditures in light of the fact that most of the department's funding is received on a reimbursement basis. Therefore, access to the proper financial information is important. A school food service program needs access to three types of financial statements:

- A balance sheet, which shows the financial condition of the fund at a given point.
- A profit and loss statement that provides the costs of goods and services and a summary of revenue and net income.
- A statement of financial position or fund balance, which provides a summary of the fund to date, showing changes in working capital from one year to the next.

The district's monthly financial statements do report activity by school. However, no profit and loss reports exist that allow the district to easily compare one cafeteria operation to another. The director of Child Nutrition must manually enter data into a profit and loss spreadsheet in order to monitor cafeteria performance and compare it to district standards. This process is time-consuming and difficult to complete. When the review team asked for historical financial data from the department, it took several days to generate a report. VISD's Pentamation system is capable of running reports with the necessary information. However, the district's MIS department will need to develop a report query to pull the required information.

Collier County Public Schools in Florida have generated management reports from their point-of-sale system that provide statistics by cafeteria so that they can be monitored easily and provide management with the opportunity to respond quickly to any variances. It also provides management with a performance measurement tool by which to hold cafeteria manager accountable for the levels of inventory they hold, their labor and food costs, and meal participation rates. The system generates graphics that simplify the comparisons by showing meals per labor hour, participation rates, and food costs by campus and by school type. The director of Food Services also has a clear understanding of what the food service fund balance is at any given time.

VISD should create management reports to track individual cafeteria performance. Production reports can track food costs, as well as waste, by campus. The Child Nutrition Department should work with MIS to create a report query that can import all raw data from the various sources to create management reports for the director. Access to current information will allow the director to make timely adjustments when necessary and give the department a powerful budgeting and planning tool.

BREAKFAST PARTICIPATION RATES (REC. 99)

The district lacks aggressive strategies to increase breakfast participation. Although the district has seen some growth in the breakfast program, less than one-quarter of students are participating. Secondary school participation rates in the breakfast program are substantially below the elementary rates. The average middle school breakfast participation is 11.9 percent, while high school participation is 5.3 percent. Research has shown that students who eat breakfast on a regular basis perform better in school and are generally healthier.

The district has one universal breakfast program at Smith Elementary. Students have the option of having a hot breakfast in the cafeteria, or they can pick up a "Grab-n-Go" breakfast in a bag to take to their classrooms. Smith Elementary has the highest participation rate in the district, at 58.6 percent.

According to the Texas Association School Nutrition (TASN), studies from across the nation and from school districts that have piloted similar programs to Breakfast-in-a-Bag have identified the following educational benefits to be expected from increased participation in the School Breakfast Program:

- Increased school attendance;
- Increased student attention;
- Improved student behavior;
- Decreased dropout rates;
- Reduced disciplinary referrals;
- Increased parental and community involvement;
- Reduced tardiness; and
- Measurably improved test scores.

Breakfasts served under National School Breakfast Program guidelines provide 25 percent of a student's daily nutritional needs. Students eating both breakfast and lunch at school receive 60 percent of their daily nutritional needs. Since sound nutrition is a basic building block of good health, students in school districts that act to increase participation in breakfast programs may receive the following health benefits:

- Reduced visits to the nurse;
- Increased attention to sound nutrition at home;
- Reduced absences due to headache or stomach ache;
- Improved overall health; and
- Decreased absences due to illness.

Brownsville ISD (BISD) has been successfully serving Breakfast-in-a Bag for a number of years. The Breakfast-in-a-Bag Program brings breakfast directly to the classroom. Either a teacher's aide or a teacher picks up the breakfasts from the cafeteria and takes them to the classroom. Students eat their breakfast during the morning announcements. The average breakfast participation rate for schools that serve Breakfast-in-a-Bag is 82 percent district-wide, as compared to a 49 percent participation rate in schools not electing to serve Breakfast-in-a-Bag. In many of the district's elementary schools, breakfast participation is above 90 percent when serving Breakfast-in-a-Bag. Only two middle schools serve students Breakfast-in-a-Bag and average 87 percent participation in the program. Pace and Porter High Schools participate in the program, with an average participation rate of 68 percent, as compared to the three other high schools not offering the program that average a 38 percent participation rate in breakfast.

VISD should implement a Breakfast-in-the Classroom breakfast option throughout the district to raise breakfast participation. Many school districts have become conscious of the importance of

providing breakfast to its students. It is often difficult for parents to provide breakfast to their children before school. Another factor that can reduce breakfast participation is bus schedules. Often students are not dropped off early enough to go through the serving line prior to the start of class. The Breakfast-in-the-Classroom Program resolves each of these issues and provides every student with the opportunity to participate in breakfast and derive the academic, and health benefits associated with eating a nutritious breakfast.

The fiscal impact calculation assumes that the district can increase average breakfast participation 2 percentage points each year, with 2003–04 as the baseline. The incremental revenue in the first year is calculated by increasing breakfast participation by 2 percentage points annually and multiplying it by the reimbursement rate and meal price for the full price meals, reduced price meals, and free meals reported by each school and subtracting the 2003–04 revenue. Each incremental increase is added to subsequent years. **Exhibit 12–6** summarizes the incremental revenue for each year by school.

Exhibit 12–7 summarizes the net savings the district can realize by implementing this recommendation. Food and labor costs are based on the district's current distribution of expenditures—47 percent for labor and 35 percent for food costs. The first year savings will be pro-rated, as it is assumed the pilot will not begin until January 2005.

EXHIBIT 12-6
PROJECTED 2 PERCENT INCREMENTAL REVENUE PER ANNUM
FROM INCREASED BREAKFAST PARTICIPATION

SCHOOL	2004-05	2005-06	2006-07	2007-08	2008-09
Aloe E.S.	\$550	\$1,661	\$3,893	\$8,370	\$17,335
Chandler E.S.	364	1,099	2,576	5,539	11,472
DeLeon E.S.	261	788	1,847	3,972	8,225
Dudley E.S.	684	2,064	4,840	10,405	21,550
F.W. Gross E.S.	784	2,367	5,549	11,929	24,706
Guadalupe E.S.	267	807	1,892	4,067	8,423
Hopkins E.S.	686	2,071	4,855	10,438	21,619
Juan Linn E.S.	664	2,006	4,703	10,111	20,941
Mission Valley E.S.	251	759	1,779	3,825	7,922
O'Connor E.S.	907	2,738	6,419	13,800	28,581
Rowland E.S.	1,067	3,223	7,556	16,245	33,646
Shields E.S.	993	2,998	7,028	15,109	31,293
Smith E.S.	1,420	4,288	10,053	21,613	44,763
Vickers E.S.	474	1,430	3,353	7,208	14,929
William Wood E.S.	248	747	1,752	3,767	7,803
Crain M.S.	817	2,466	5,782	12,430	25,744
Howell M.S.	544	1,644	3,854	8,286	17,162
Patti Welder M.S.	738	2,229	5,227	11,237	23,273
Memorial H.S. Stroman Campus	514	1,553	3,641	7,827	16,211
Memorial H.S. Senior Campus	678	2,047	4,798	10,315	21,364
Total	\$12,911	\$38,985	\$91,397	\$196,493	\$406,962

SOURCE: Gibson Consulting Group, Inc.

*Totals may not add due to rounding.

**EXHIBIT 12-7
NET SAVINGS**

YEAR	INCREMENTAL REVENUE	FOOD COSTS	LABOR COSTS	NET SAVINGS
2004-05	\$12,911	\$4,518	\$6,067	\$2,326
2005-06	\$38,985	\$13,644	\$18,323	\$7,018
2006-07	\$91,397	\$31,989	\$42,957	\$16,451
2007-08	\$196,493	\$68,773	\$92,353	\$35,367
2008-09	\$406,962	\$142,437	\$191,273	\$73,252

SOURCE: Gibson Consulting Group, Inc.

It should be noted that any increase in reimbursements from the National School Breakfast Program would require the state to contribute its matching portion.

**COMPETITIVE FOOD SALES
(REC. 100)**

VISD fails to adequately enforce the existing board policy prohibiting the sale of competitive food during meal periods. Competitive food sales are driving down meal participation. Allowing competitive food that does not meet the nutritional standards, as set out by the United States Department of Agriculture (USDA), during specified meal times puts the district at risk of losing its National School Lunch and School Breakfast program funding. One major source of income for student organizations is concession sales. During site visits to cafeterias around the district, there were a number of campus organizations selling competitive foods. The end of the school year is a particularly popular time for student organizations to raise money by selling competitive foods.

Vending machine and concession items often do not meet the minimum nutrient value prescribed by the USDA. These items directly compete with the more nutritious and healthy lunches provided by the VISD Child Nutrition Department. Not all campuses in the district have vending machines, and the district tries to stock drink machines with healthy alternatives to carbonated drinks. However, most snack machines contain foods of minimal nutritional value (FMNV). FMNV include carbonated beverages; water ices that do not include fruit or fruit juices; chewing gum and candies made predominantly from sweeteners such as hard candies like lollipops, mints, and jaw breakers; jellies and gums such as jelly beans; and marshmallow candies, fondant, licorice, spun candy, and candy coated popcorn. During site visits to schools around the district, vending machines were found within the line of sight of some cafeterias; however, the district stated the machines would be moved prior to the 2004-05 school year.

Another type of competitive food is fast food brought in when students leave the campus for any reason. During the site visit, the review team

witnessed several examples of students eating fast food items from several popular restaurants. Although students are not restricted from bringing these items to school, it adversely impacts the campus meal participation and provides questionable nutritional value to students. These items, in addition to having limited nutritional value, are considerably more expensive than the reimbursable meal items and ala carte items served in the school cafeteria.

The USDA has launched efforts “to foster healthy school nutrition environments that support proper nutrition and the development of healthy eating habits.” A set of health goals and objectives called “Healthy People 2010” has been developed in an effort to counteract the rising incidence of child obesity and improve the quality of student diets. In March 2004, the Texas Department of Agriculture (TDA) released the Overview of the Texas Public School Nutrition Policy. The policy outlines the following restrictions:

ELEMENTARY SCHOOLS

- No FMNVs or candy at any time;
- No competitive foods at any time;
- French fries may not exceed 3 ounces per serving, may only be served once a week, and students may only purchase one serving at a time.

MIDDLE AND JUNIOR HIGH SCHOOLS

- No FMNVs or candy until after last lunch period;
- No competitive foods during meal times;
- French fries may not exceed 3 ounces per serving, may only be served once a week, and students may only purchase one serving at a time;
- In addition, a middle school campus may not serve or provide access for students to prohibited carbonated beverages with volumes in excess of 12 ounces anywhere on school premises during the school day.

HIGH SCHOOLS

- No FMNVs during meal times in areas where reimbursable meals are served and/or consumed;

- No competitive foods during meal times in areas where reimbursable meals are served and/or consumed;
- New vendor contracts starting March 3, 2004 and contract renewals after this date must expressly prohibit the sale of sugared, carbonated beverages in containers larger than 12 ounces;
- By 2005–06, the goal is to have no more than 30 percent of the beverages available in vending machines to be sugared, carbonated soft drinks;
- French fries may not exceed 3 ounces per serving, and students may only purchase one serving at a time.

ALL GRADE LEVELS

- Eliminate deep fat frying as method of on-site preparation;
- Portion size restriction on chips, certain snacks and sweets, milk and fruit drinks;
- Limits on fats and sugars per serving; and
- Fruits and vegetables should be offered daily on all points of service.

TDA has stated that it “will aggressively enforce and diligently monitor this policy to ensure continued compliance. When violations occur, the TDA will disallow all meal reimbursements for the day and require the school to reimburse the food service account for the lost reimbursement. A documented corrective action plan will be required and will be diligently monitored to ensure continued compliance.” VISD’s Child Nutrition Department is currently taking steps to ensure it will be in compliance with the new regulations. However, all district personnel must understand and comply with the new regulations, or they will risk the district’s federal funding.

Many school districts establish policies and procedures to restrict the sale of foods in competition with meals served under the National School Lunch and Breakfast Programs. Because vending machines and concession sales are fundraisers for a number of school organizations, many schools do not eliminate the practice, but restrict it during lunch periods. Bastrop ISD established a district policy to control the sales of foods in competition with meals served by the school cafeterias. The district implemented procedures where all vending machine companies had to work with the Food Services Department. One school district in California has recently banned all vending machines from all schools in an effort to increase participation and ensure that its students did not have access to FMNV.

VISD should strengthen the existing board policy to restrict competitive foods on campuses during meal periods. The policy should define restrictions on student groups selling competitive food items and should ban fast food items from all the schools. Local school boards have the authority to restrict outside food items from campuses. The director of Child Nutrition should work with principals and school sponsors to develop and implement policies that restrict the sale of outside food items during the servings periods and ban fast food at all schools.

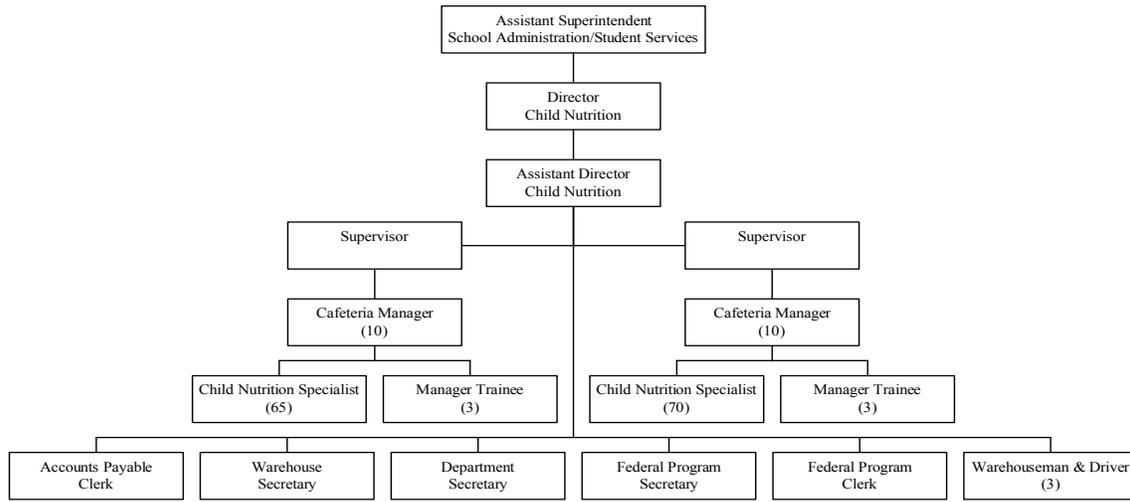
The director of Child Nutrition should also develop information packets for parents telling them what kinds of foods are defined as foods of minimal nutritional value (FMNV) and inform them that students will no longer be able to bring fast food to the cafeteria. It will be difficult to garner acceptance of this portion of the new policy. However, if the district designs an educational program for parents and students that explains the nutritional limitations of fast food, communicates the more restrictive state nutrition guidelines, and provides statistics on child obesity and the impact on health, it should be more readily accepted.

ORGANIZATIONAL STRUCTURE (REC. 101)

The Child Nutrition Department’s formal organization structure is not reflective of the functional management of the department. The organization chart shows the director of Child Nutrition having only one person directly reporting to her, the assistant director of Child Nutrition. However, according to the Food Services Employee Handbook, the director is responsible for evaluating the assistant director, the supervisors, and the office staff. When interviewing central office staff, there was confusion as to whether they reported to the assistant director or to the director, many telling the review team that they reported to both. The current organization structure does not provide staff with a clear understanding of management responsibilities in the department. Traditionally, an employee reports to the supervisor who performs his or her annual performance evaluation. It is very important that an employee knows who is responsible for evaluating job performance. Without a clear reporting hierarchy, an employee is left to define job expectations on their own. Ambiguity raises the district’s vulnerability should an employee file a grievance.

The current Child Nutrition Department’s organizational chart is shown as **Exhibit 12–8**. The assistant director is responsible for overseeing the warehouse, monitoring food production reports, assisting with menu planning, and the upgrade of the

**EXHIBIT 12-8
CHILD NUTRITION DEPARTMENT ORGANIZATION
2003-04**



SOURCE: VISD, Child Nutrition Department, 2003-04.

Point Of Service (POS) computer system. One supervisor is responsible for personnel, training, and updating procedural guidelines. The other supervisor deals primarily with computer problems for the department and the school cafeterias, including training managers on using the POS system. Each supervisor oversees the cafeteria managers. Each cafeteria is staffed with a manager and a minimum of three child nutrition specialists.

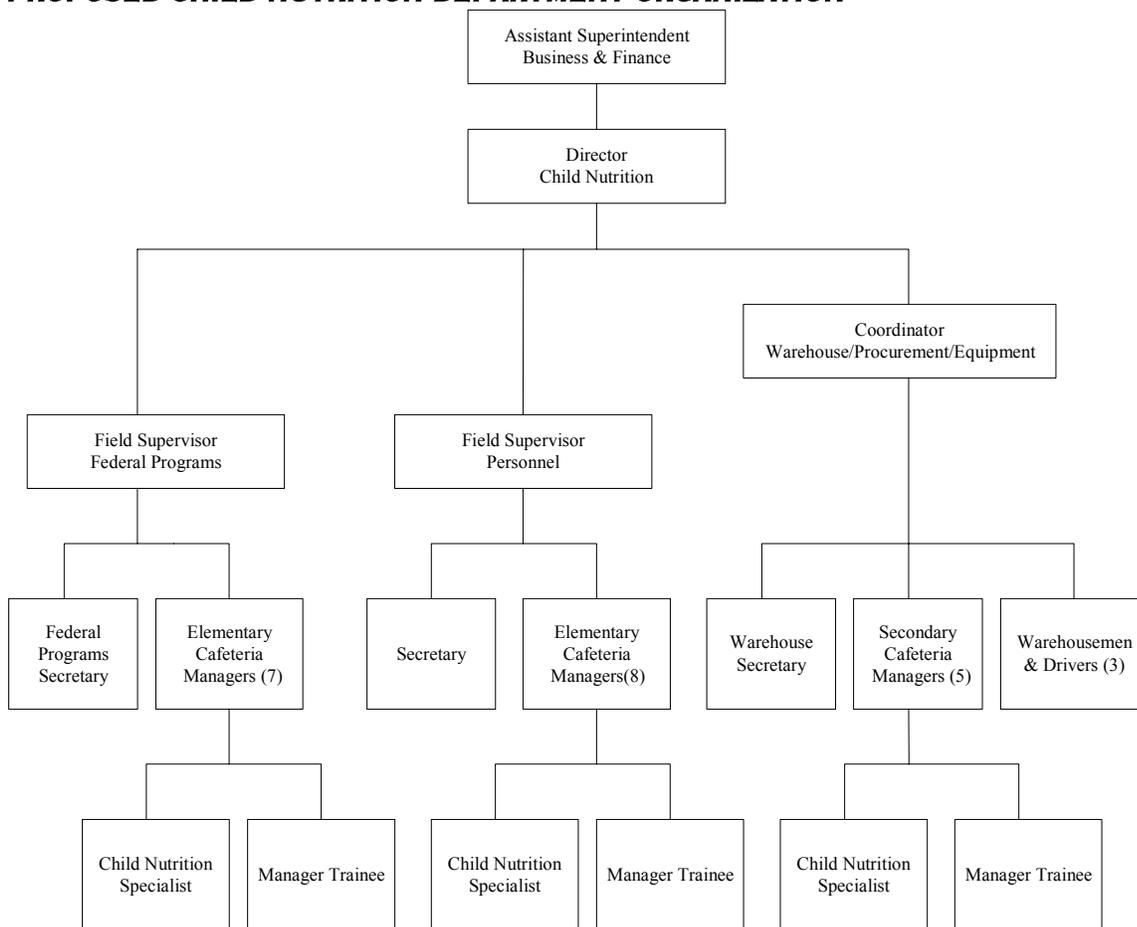
A well-developed organization chart allows management to visualize the departmental structure and assess its ability to achieve organizational and departmental goals. For employees, having an accurate organization chart provides a sense of mission and context and facilitates enhanced productivity, teamwork, and participation. Organizational charts communicate leadership, organizational units, culture as indicated by the horizontal or vertical nature of the department and the relative placement of various functions, and reporting relationships and dependencies within the department. An organizational chart can facilitate strategic decision support, compliance, budgeting, and operational and logistical planning; knowledge management; the empowerment of employees; teamwork, orientation, and career; and succession planning within the department.

VISD should clarify the departmental organization chart to more accurately reflect the department's reporting hierarchy and duties. The organization chart should be updated to reflect the change, and new job descriptions should be posted that define the duties of each position. The recommended job functions for the coordinator and field supervisors are as follows:

- **Coordinator–Warehouse/Procurement/Equipment:** This position will be responsible for the daily management of the warehouse, ensuring purchasing and inventory procedures are followed, and all equipment purchases and repairs. All secondary school cafeterias should be assigned to this position. Secondary school cafeterias serve a much different and larger student group than elementary schools. At the secondary level, ala carte choices are expanded and staffing requirements are much greater due to the increased number of serving lines. By assigning schools by type, the supervisor will be able to focus on the specific needs of each cafeteria based on the student population being served.
- **Field Supervisor–Personnel:** This position will be responsible for the department's personnel duties, including recruitment, staff development, manager training, maintaining job descriptions, and act as the departmental liaison with the district's Human Resources Department. Eight of the fifteen elementary cafeteria managers should report to this position.
- **Field Supervisor–Federal Program:** This position will be responsible for troubleshooting the POS system, conducting software training for cafeteria managers, and overseeing the federal program reporting. The remaining seven elementary cafeteria managers should report to this position.

Exhibit 12-9 presents the recommended organization chart for the department.

**EXHIBIT 12-9
PROPOSED CHILD NUTRITION DEPARTMENT ORGANIZATION**



Source: Gibson Consulting Group, Inc., May 2004.

There will be no salary adjustment since an assistant director and a coordinator are at the same level on the district's pay scale.

CASH COLLECTIONS (REC. 102)

The district does not universally encourage meal pre-payment. Some schools collect lunch money in the classroom and select a student to deliver it to the cafeteria. This practice places the student in an unsafe situation. In some elementary schools in the district, teachers take up a collection in the morning for lunch and place the money in an unsealed manila envelope. A student is selected to take the envelope to the cafeteria. The envelopes are stacked by the cash register until the cafeteria manager collects them later in the morning and takes them back to the office. This practice places the student in jeopardy, as he or she could become a target between the classroom and the cafeteria. This practice also poses a potential for theft since the envelopes are unsecured. It would be very difficult to trace missing funds.

Most school districts collect money for meals in the cafeteria. This practice allows more direct contact with each student to ensure that the money is applied to the proper account. The cash receipts are more secure as they are placed in the locked cash register drawer, and there are more cash controls in place in the cafeteria.

The district should encourage meal pre-payment and eliminate the practice of allowing elementary students to deliver meal money to the cafeteria. Students could also pay as they go through the serving line if meals were not pre-paid. The district has a point-of-service system in place that would create better cash control if pre-payment is encouraged.

For additional information related to Food Service, see page 260 in the General Information section of the Appendices.

FISCAL IMPACT

RECOMMENDATION	2004-05	2005-06	2006-07	2007-08	2008-09	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
CHAPTER 12: FOOD SERVICE							
95. Use the industry standard meal equivalent conversion factor and raise the district's meals per labor hour (MPLH) target based on the type of kitchen and number of meal equivalents served, and monitor staffing levels to ensure target is achieved.	\$166,761	\$250,141	\$250,141	\$250,141	\$250,141	\$1,167,325	\$0
96. Develop a kitchen equipment replacement plan and budget accordingly.	(\$100,000)	(\$100,000)	(\$100,000)	(\$100,000)	(\$100,000)	(\$500,000)	\$0
97. Prepare a five-year preventative maintenance plan to increase the useful life of kitchen equipment.	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)	(\$250,000)	\$0
98. Create management reports to track individual cafeteria performance.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
99. Implement a Breakfast in the Classroom option throughout the district to raise breakfast participation.	\$2,326	\$7,018	\$16,451	\$35,367	\$73,252	\$134,414	\$0
100. Strengthen the existing board policy to restrict competitive foods on campuses during meal periods.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
101. Clarify the Child Nutrition Department's organization to more accurately reflect the department's reporting hierarchy and duties.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
102. Encourage cafeteria meal prepayment and eliminate the practice of allowing elementary students to deliver meal money to the cafeteria.	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Totals- Chapter 12	\$19,087	\$107,159	\$116,592	\$135,508	\$173,393	\$551,739	\$0

GENERAL INFORMATION

CHAPTER 1 EDUCATIONAL SERVICE DELIVERY

Effective educational service delivery requires appropriate instructional guidance, capable teachers, adequate resources, and a thorough understanding of students' instructional needs.

In 1971, the federal Office of Civil Rights (OCR) notified VISD that it must draw up a plan to desegregate. After a number of court hearings and more than a decade of lost federal revenue, VISD developed a plan to create more racially balanced schools. Three full magnet schools and two mini-magnet schools opened in 1986 as a way to address the federal desegregation order. Until 1993, all funding for magnet programs was provided through local taxes. In 1993, VISD received federal grant funds to continue its magnet programs. In 2003-04, the district operates seven magnet schools: Juan Linn Elementary, Hopkins Elementary, F.W. Gross Elementary, Dudley Elementary, Connor Elementary, Shields Elementary, and Patti Welder Middle School.

Community growth patterns over the years, which shifted the city's population primarily north, with little movement possible to the east, west, and south, created a racial imbalance between the district's two high schools, Stroman and Victoria. **Exhibit A-1** shows the 1999-2000 ethnic breakdown of VISD as a whole compared to the ethnic breakdowns by high school campus. Stroman High School had a higher percentage of African American and Hispanic students (10 percent and 57.4 percent, respectively), than Victoria High School. This pattern of ethnic imbalance continued despite district efforts to create ethnically balanced schools through several programs.

In 1999, a committee of 15 community members organized around two primary tasks: create a balance between enrollments at the two high schools without jeopardizing state or federal funding; and create a situation in which each high schools' ethnic make-up more closely reflects that of the overall district.

Starting with 12 different options for solution to the issue, the committee narrowed its recommendations

EXHIBIT A-1 VISD ETHNIC BREAKDOWN BY HIGH SCHOOL CAMPUS 1999-2000

	PERCENT AFRICAN- AMERICAN	PERCENT HISPANIC	PERCENT WHITE
District	8.3%	49.9%	40.8%
Stroman High School	10.0%	57.4%	31.9%
Victoria High School	6.0%	35.9%	56.5%

SOURCE: Texas Education Agency, AEIS 1999-2000

to three: redistrict based upon an east/west split of the district; redistrict based upon selection of specific subdivisions; and consolidate the two high schools into a single school with two campuses, one for grades 9 and 10 and the other for grades 11 and 12.

The board consolidated the two high schools into one school with two campuses—Memorial High-Stroman (grades 9 and 10) and Memorial High-Senior (grades 11 and 12).

Compared to its peers, VISD has the lowest percentage of African American students, the highest percentage of Hispanic students, and the second highest percentage of Anglo students. The percentages of African American, Anglo, and Other students are lower than the state and regional averages, while the percentage of Hispanic students is higher than the averages of the state and region (**Exhibit A-2**). VISD has the third lowest percentage of economically disadvantaged students among its peers, and a lower percentage than the regional average. The district's percentage of economically disadvantaged students is slightly higher than the state average.

Exhibit A-3 shows the organization of VISD's Curriculum and Instruction functions. The Curriculum and Instruction Department is headed by an assistant superintendent who oversees Curriculum, Testing, and Evaluation; Special Services (Special Education); federal and state programs; magnet schools; and Management Information Systems (MIS). The director of Curriculum is responsible for curriculum initiatives in the district, including curriculum alignment. The director of Testing and Evaluation coordinates the administration of the statewide testing program and conducts program evaluations. The director of Special Services oversees all Special Education coordinators, counselors, licensed specialists in School Psychology, diagnosticians, and speech pathologists in the district.

As this exhibit shows, other instruction-related functions fall to other areas in the organization, including principal oversight, which falls to the assistant superintendent for School Improvement; and Student Services and student attendance, which fall under the direction of the assistant superintendent for School Administration. Athletics and is supervised directly by the superintendent.

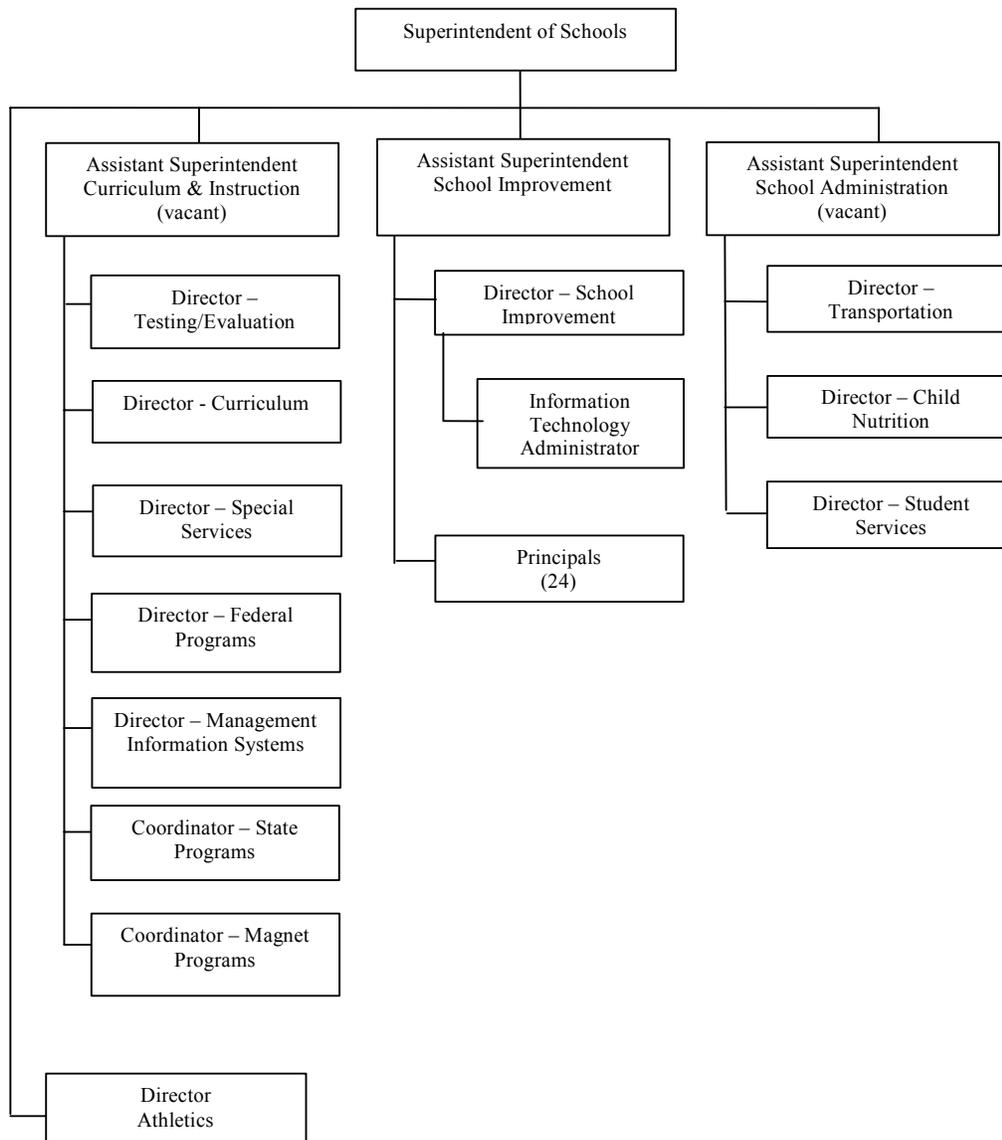
In 2003-04, VISD employed 2,123.8 total personnel, including 969.7 teachers, 52.5 campus administrators, 18.8 central office administrators, 169.6 professional support employees, 287.5 educational aides, and 625.7 auxiliary personnel or full-time non-educational staff, such as maintenance or food

**EXHIBIT A-2
 DEMOGRAPHIC CHARACTERISTICS OF STUDENTS
 VISD, PEER DISTRICTS, REGION 3 AND THE STATE
 2003-04**

DISTRICT	STUDENT ENROLLMENT	RACIAL/ETHNIC PERCENT				ECONOMICALLY DISADVANTAGED
		AFRICAN-AMERICAN	HISPANIC	ANGLO	OTHER	
Victoria	14,316	8.4%	53.0%	37.4%	1.2%	53.0%
Bryan	14,104	25.0%	38.1%	36.2%	0.7%	62.1%
Lamar Consolidated	17,724	14.2%	47.4%	35.7%	2.7%	45.8%
Tyler	17,273	34.0%	31.6%	33.0%	1.4%	55.0%
Wichita Falls	15,035	17.5%	22.3%	56.7%	3.4%	50.9%
Region 3	54,706	10.8%	44.9%	43.0%	1.3%	53.4%
State	4,311,502	14.3%	43.8%	38.7%	3.2%	52.8%

SOURCE: Texas Education Agency, Public Education Information Management Systems (PEIMS), 2003-04.
 NOTE: Totals may not add to 100 percent due to rounding.

**EXHIBIT A-3
 VISD'S ORGANIZATION**



SOURCE: VISD organizational charts and interviews with VISD staff, April 2004.

service employees. As indicated in **Exhibit A-4**, the percentages of teachers, campus administrators, and central administrators are lower than the state averages. VISD's percentages of professional support, educational aides, and auxiliary staff are higher than the state average in those three categories.

VISD's share of beginning teachers is 5.1 percent, which is the second lowest among its peers and lower than the state average (6.5 percent); however, it is higher than the Region 3 average (4.8 percent). Almost 55 percent of VISD's teachers have 11 or more years of experience, making it the highest among its peers and higher than the state average, but it is lower than the Region 3 average (**Exhibit A-5**).

Compared to the peer averages, VISD's share of teachers without a degree is the highest at 1.2 percent, which is lower than Region 3 and higher than the state standards. The number of VISD teachers with a masters and doctorate degree is lower than the state average but higher than the Region 3 average (**Exhibit A-6**).

PEIMS also provides information on the percentage of students enrolled in various programs, including regular education, bilingual education and English as a Second Language (ESL), career and technology education (CATE), gifted and talented education (G/T), and special education (**Exhibit A-7**).

Compared to its peers, VISD has the third lowest percentage of students enrolled in special education programs (12.0 percent), the lowest percentage of students enrolled in G/T (5.0 percent), the lowest percentage enrolled in bilingual/ESL programs (2.7 percent), and the second lowest percentage enrolled in CATE programs (20.2 percent). The percentage of VISD students enrolled in the bilingual/ESL program is the lowest among its peers. Compared to the state averages, the percentage of VISD students enrolled in the G/T and bilingual/ESL programs is lower, while the percentage of students enrolled in special education and CATE are higher.

Exhibit A-8 shows the percentage of teachers by program for VISD, its peers, Region 3, and the state.

In 2003-04, VISD's total budgeted instructional operating expenditures per student ranked third

**EXHIBIT A-4
STAFF INFORMATION
VISD AND STATE TOTALS
1998-99 AND 2003-04**

CATEGORY	VISD		STATE	
	1998-99	2003-04	1998-99	2003-04
STAFF				
Teachers	46.1%	45.7%	51.4%	50.4%
Professional Support	8.0%	8.0%	7.2%	7.8%
Campus Administration	2.3%	2.5%	2.5%	2.7%
Central Administration	0.6%	0.9%	0.9%	1.0%
Educational Aides	14.6%	13.5%	10.3%	10.2%
Auxiliary Staff	28.3%	29.5%	27.7%	27.8%
TEACHERS BY RACE/ETHNICITY				
African American	7.2%	6.0%	8.3%	8.80%
Hispanic	15.4%	17.5%	16.3%	18.80%
Anglo	77.1%	76.0%	74.6%	71.10%
Other	0.3%	0.5%	0.9%	1.20%

SOURCE: Texas Education Agency, Academic Excellence Indicator System (AEIS), 1998-99 and PEIMS 2003-04.
NOTE: Totals may not add to 100 percent due to rounding.

**EXHIBIT A-5
PERCENT OF TEACHERS BY YEARS OF EXPERIENCE
VISD, PEER DISTRICTS, REGION 3, AND THE STATE
2003-04**

DISTRICT	BEGINNING	1-5 YEARS	6-10 YEARS	11-20 YEARS	20+ YEARS	11+ YEARS
Victoria	5.1%	23.0%	17.7%	26.4%	27.8%	54.2%
Bryan	8.0%	34.9%	19.4%	21.6%	16.0%	37.6%
Lamar Consolidated	5.6%	32.0%	21.0%	21.7%	19.8%	41.4%
Tyler	6.6%	28.3%	17.3%	24.9%	23.0%	47.9%
Wichita Falls	4.3%	26.5%	18.7%	30.2%	20.4%	50.6%
Region 3	4.8%	21.3%	17.3%	29.1%	27.5%	56.6%
State	6.5%	29.0%	18.9%	24.8%	20.9%	45.7%

SOURCE: Texas Education Agency, PEIMS, 2003-04.

EXHIBIT A-6
DEGREE STATUS OF TEACHERS
VISD, PEER DISTRICTS, REGION 3, AND THE STATE
2003-04

DISTRICT	PERCENT WITH DEGREE				
	NO DEGREE	BACHELORS	MASTERS	DOCTORATE	MASTERS AND DOCTORATE
Victoria	1.2%	78.9%	19.5%	0.3%	19.8%
Bryan	0.2%	80.5%	19.0%	0.3%	19.3%
Lamar Consolidated	0.7%	79.3%	19.7%	0.3%	20.0%
Tyler	0.5%	71.8%	27.3%	0.3%	27.6%
Wichita Falls	0.9%	80.3%	18.8%	0.0%	18.8%
Region 3	1.3%	81.8%	16.5%	0.3%	16.8%
State	1.1%	76.4%	22.0%	0.5%	22.5%

SOURCE: Texas Education Agency, PEIMS, 2003-04.

EXHIBIT A-7
PERCENT OF STUDENT ENROLLMENT BY PROGRAM
VISD, PEER DISTRICTS, REGION 3 AND THE STATE
2003-04

DISTRICT	SPECIAL EDUCATION	GIFTED AND TALENTED	BILINGUAL/ESL	CAREER AND TECHNOLOGY
Victoria	12.0%	5.0%	2.7%	20.2%
Bryan	10.6%	10.6%	10.5%	21.5%
Lamar Consolidated	11.8%	8.1%	10.6%	18.8%
Tyler	12.7%	7.2%	15.0%	27.5%
Wichita Falls	13.7%	7.6%	4.0%	21.1%
Region 3	13.1%	7.5%	4.5%	24.7%
State	11.6%	7.8%	14.1%	20.1%

SOURCE: Texas Education Agency, PEIMS, 2003-04.

EXHIBIT A-8
PERCENT OF TEACHERS BY PROGRAM
VISD, PEER DISTRICTS, REGION 3, AND THE STATE
2003-04

DISTRICT	REGULAR EDUCATION	COMP. EDUCATION	SPECIAL EDUCATION	GIFTED AND TALENTED	BILINGUAL/ESL	CAREER & TECHNOLOGY	OTHER
Victoria	67.0%	8.2%	13.6%	1.3%	1.5%	4.5%	4.0%
Bryan	71.6%	1.8%	12.8%	2.1%	5.7%	3.5%	2.5%
Lamar Consolidated	69.5%	2.8%	11.9%	2.3%	3.9%	3.2%	6.4%
Tyler	71.6%	1.5%	12.2%	1.1%	7.5%	3.2%	2.9%
Wichita Falls	77.0%	3.8%	11.4%	0.2%	1.4%	3.1%	3.1%
Region 3	73.6%	4.8%	9.6%	1.5%	1.7%	5.9%	2.9%
State	69.5%	2.9%	10.3%	2.2%	8.4%	4.1%	2.5%

SOURCE: Texas Education Agency, PEIMS, 2003-04.

NOTE: Totals may not add to 100 percent due to rounding.

lowest when compared to its peers. Categorically, VISD's budgeted instructional operating expenditures per student were lowest in regular education and compensation education, and highest in G/T, Bilingual/ESL, and special education. VISD ranked the second lowest in CATE education (Exhibit A-9).

STUDENT PERFORMANCE

School districts should use a variety of assessments to determine how well students respond to curriculum and instruction. To accomplish this goal, districts must maintain a comprehensive program for student assessment that evaluates achievement across content areas, grades, and subgroups (e.g., economically disadvantaged). The state requires all districts to administer the Texas Assessment of

Knowledge and Skills (TAKS) to students in grades 3 through 11. Other assessments include advanced placement (AP) exams, college entrance exams, and classroom performance-based assessments.

Prior to 2002-03, Texas measured student performance using the Texas Assessment of Academic Skills (TAAS). Districts administered TAAS in reading and mathematics in grades 3 through 8 and grade 10; in reading and mathematics in Spanish in grades 3 and 4; in writing in grades 4, 8, and 10; and in science and social studies in grade 8. Districts also administered end-of-course examinations in Algebra I, Biology, English II, and U.S. History. Texas high school graduation depended upon student passage of the TAAS exit-level examination, which was given for the first time in grade 10.

**EXHIBIT A-9
BUDGETED INSTRUCTIONAL OPERATING EXPENDITURES
VISD, PEER DISTRICTS, REGION 3, AND THE STATE
2003-04**

DISTRICT	TOTAL INSTRUCTIONAL OPERATING EXPENDITURES* PER STUDENT	PERCENT OF BUDGETED INSTRUCTIONAL OPERATING EXPENDITURES**					
		REGULAR EDUCATION	GIFTED & TALENTED	SPECIAL EDUCATION	CAREER & TECHNOLOGY EDUCATION	BILINGUAL/ESL	COMP. EDUCATION
Victoria	\$3,555	71.8%	3.0%	15.4%	4.1%	2.4%	0.8%
Bryan	\$3,538	78.8%	0.3%	12.3%	3.7%	0.1%	1.9%
Lamar Consolidated	\$3,812	77.1%	0.8%	12.4%	4.2%	0.5%	1.6%
Tyler	\$3,597	75.0%	0.9%	11.6%	4.8%	0.7%	1.0%
Wichita Falls	\$3,352	78.2%	0.4%	11.3%	4.4%	0.7%	2.2%
Region 3	N/A	N/A	N/A	N/A	N/A	N/A	N/A
State	N/A	N/A	N/A	N/A	N/A	N/A	N/A

SOURCE: Texas Education Agency, PEIMS, 2003-04.
*Instruction (Functions 11, 95) and Instructional Leadership (Function 21).
**Functions 11 and 95 only.

In 2002-03, the TAAS was replaced by the more rigorous TAKS, as mandated by Senate Bill 103. Districts administer the TAKS in all grade levels 3 through 11. Reading and mathematics tests were added in grade 9. The exit-level TAKS was moved to grade 11 beginning in 2003-04. Exit-level exams include science, social studies, English language arts, and mathematics. Districts also administer a TAKS science test in grades 5 and 10 and a TAKS social studies test in grades 8 and 10.

The accountability system integrates the statewide curriculum; the state criterion-referenced assessment system; district and campus accountability; district and campus recognition for high performance and significant increases in performance; sanctions for poor performance; and school, district, and state-level reports.

The commissioner of Education sets the standards for each accountability rating category within parameters specified in statute. The accountability standards were designed to phase in increasingly higher expectations for districts and campuses.

Schools are not rated if they do not serve students in grades 1 through 12, such as pre-kindergarten centers, or if a school has no official enrollment, such as certain magnet schools where students are reported through their sending school. Additionally, schools that have applied to TEA and are identified

as alternative education programs (AEP) are evaluated under alternative education (AE) procedures, resulting in one of the following three ratings: *AE: Acceptable*, *AE: Needs Peer Review*, or *AE: Not Rated*.

From 1998-99 through 2002-04, VISD has received a district rating of *Academically Acceptable*. In 2003-04, all of the secondary schools were rated as Academically Acceptable and nine of the district's elementary schools earned a rating of Recognized.

Exhibit A-10 compares VISD and the state pass rates on TAAS through 2002 and TAKS in 2003. VISD performed better than the state on the TAAS in all areas tested except in mathematics for 2001 and 2002 and writing for 2002. The district's TAAS pass rates improved for reading, mathematics, and all tests, and declined in writing from 1999-2000 through 2001-2002. The TAKS was given for the first time in 2002-03, and both VISD and state pass rates declined in all content areas. VISD's pass rates, however, declined to a greater extent than the state's. VISD had lower TAKS pass rates in three of five areas (English, mathematics, and all tests) and higher TAKS pass rates in two of five areas (writing and reading). The largest discrepancies between VISD and the state were in mathematics and the 'all tests' categories, with VISD scoring approximately 4 percentage points below the state in each category.

**EXHIBIT A-10
VISD AND THE STATE
TAKS PASS RATES
READING, ENGLISH LANGUAGE ARTS MATHEMATICS, WRITING, AND ALL TESTS
1999-2000 THROUGH 2002-2003**

YEAR	READING		ENGLISH		MATHEMATICS		WRITING		ALL TESTS	
	VISD	STATE	VISD	STATE	VISD	STATE	VISD	STATE	VISD	STATE
1999-2000	89.0%	87.4%	N/A	N/A	88.5%	87.4%	90.2%	88.2%	81.5%	79.9%
2000-2001	90.8%	88.9%	N/A	N/A	91.0%	90.2%	89.7%	87.9%	84.1%	82.1%
2001-2002	92.3%	91.3%	N/A	N/A	92.5%	92.7%	87.3%	88.7%	85.3%	85.3%
2002-2003	85.8%	85.6%	68.6%	72.8%	74.2%	78.6%	88.5%	86.3%	64.8%	69.1%

SOURCE: Texas Education Agency (TEA), Academic Excellence Indicator System (AEIS), 1999-2000 through 2002-03
NOTE: N/A=test not given during these grades.

EXHIBIT A-11
2002-2003 TAKS PASS RATES
READING, MATHEMATICS, WRITING AND ALL TESTS
VISD, PEER DISTRICTS, REGION 3, AND THE STATE

DISTRICT	READING	ENGLISH	MATHEMATICS	WRITING	ALL TESTS
Wichita Falls ISD	88.1%	76.4%	81.3%	87.8%	73.2%
Lamar CISD	87.3%	69.6%	79.9%	89.7%	70.8%
Tyler ISD	86.2%	65.0%	78.2%	89.3%	68.0%
Victoria ISD	85.8%	68.6%	74.2%	88.5%	64.8%
Bryan ISD	81.5%	64.8%	75.5%	81.8%	64.8%
Region 3	86.5%	71.0%	78.5%	86.9%	68.5%
State	85.6%	72.8%	78.6%	86.3%	69.1%

Source: Texas Education Agency (TEA), Academic Excellence Indicator System (AEIS), 2002-03.

Exhibit A-11 compares VISD's 2003 TAKS pass rates to its peer districts, Region 3, and the state. It had the lowest pass rates in mathematics and all tests and placed third highest in writing. In reading and English, its scores were the third lowest.

EXHIBIT A-12
VISD ALL TESTS TAKS PASS
RATES BY GRADE LEVEL
2002-03

GRADE LEVEL	ALL TESTS
3	87.2%
4	77.1%
5	65.9%
6	72.8%
7	63.8%
8	61.3%
9	49.4%
10	43.3%
11	34.8%

SOURCES: Texas Education Agency, AEIS, 2002-03.

Exhibit A-12 shows VISD's pass rates for all tests taken in 2002-03 from grade 3 through grade 11. The scores decrease fairly steadily with only 34.8 percent of the students passing all tests in grade 11. TAKS pass rates begin decreasing in grade 7, with 63.8 percent of students taking all tests passing, and reach a low of 34.8 percent by grade 11.

Exhibit A-13 shows 2002-03 and 2003-04 TAKS scores for reading/English, mathematics, science, and all tests taken. In 2002-03, the largest decline in TAKS pass rates was in mathematics, which began decreasing in grade 6. Reading and English pass rates

EXHIBIT A-13
VISD TAKS PASS RATES BY GRADE LEVEL
2002-03 AND 2003-04

GRADE LEVEL	READING/ENGLISH		MATHEMATICS		SCIENCE		SOCIAL STUDIES		WRITING	
	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003
3	96.0%	91.3%	92.0%	93.3%	N/A	N/A	N/A	N/A	N/A	N/A
4	86.0%	88.0%	87.0%	88.7%	N/A	N/A	N/A	N/A	92.0%	88.7%
5	83.0%	83.6%	86.0%	91.1%	74.0%	70.8%	N/A	N/A	N/A	N/A
6	84.0%	86.5%	72.0%	76.7%	N/A	N/A	N/A	N/A	N/A	N/A
7	85.0%	86.4%	67.0%	67.7%	N/A	N/A	N/A	N/A	92.0%	88.2%
8	88.0%	87.7%	60.0%	64.5%	N/A	N/A	82.0%	88.8%	N/A	N/A
9	79.0%	78.2%	42.0%	50.9%	N/A	N/A	N/A	N/A	N/A	N/A
10	61.0%	68.6%	56.0%	64.9%	59.0%	61.3%	81.0%	80.8%	N/A	N/A
11	78.0%	57.3%	78.0%	54.3%	84.0%	55.3%	96.0%	84.8%	N/A	N/A

SOURCES: Texas Education Agency, AEIS, 2002-03; VISD director of Testing and Evaluation.

NOTES: N/A=test not given during these grades.

stayed relatively stable until grade 8, with pass rates dropping by grade 11. Pass rates in science and social studies remained stable across grade levels.

In 2003-04, TAKS pass rates declined to 56 percent in grade 10, but increased to 78 percent in grade 11. Beginning in 2003-04, the grade 11 TAKS was a high stakes test, meaning that students are required to pass the test in order to graduate. Grade 11 students' pass rates throughout Texas increased. Reading and English pass rates remained relatively stable until grade 8, with pass rates declining by grade 10. Pass rates in social studies and writing remained stable across grade levels.

To address the decline in test scores, VISD developed a five-year Comprehensive Program and Student Assessment Plan (2004-08) designed to use student assessment data to evaluate instruction, curriculum, and program effectiveness. The plan includes the following:

- the purposes of student and program assessment;
- an overview of the policies and regulations related to student and program assessment;
- a description and list of the types of assessment currently used by the district by function and grade level;

- a discussion of proper uses of data including: implementing new programs, determining curriculum effectiveness, providing staff development, monitoring assessment design, and communicating all major curricular or assessment initiatives; and
- a description of the program evaluation system.

Two noteworthy uses of the plan are to determine curriculum effectiveness and to evaluate programs using a cost benefit analysis.

The plan calls for the district to review data from its state level testing, departmental testing, and performance-based assessment on an annual basis to determine curriculum effectiveness. If several schools are not meeting expectations on the same objective or set of objectives, the curriculum delivery for those objectives is to be analyzed. The outcome is an adjustment of the curriculum design or the timing of the teaching of the concept or skill encompassed by the set of objectives. When only one or two schools are failing to meet expectations in an objective or set of objectives, campus principals of those schools determine what specific changes are needed in instructional practices throughout the school or within particular classrooms. Curriculum or professional development staff members support principals in this effort. The district may use strategies such as peer coaching or professional development.

The cost-benefit evaluation analysis uses a costs-to-benefit ratio to determine program effectiveness. Costs included in the analysis are non-personnel direct, personnel, professional development, and facilities. Benefits are based on units of effectiveness, which are based on the program goals. For example, a reading program may equate one unit of effectiveness as one month of growth in grade level score, or a dropout program may equate one unit of effectiveness as a reduction of 0.05 percent in dropout incidences. Once units of effectiveness are determined for a particular type of program, all similar programs use the same metric. Therefore, the district will be able to make meaningful comparisons across programs. The district still completes more traditional program evaluations for some of its initiatives in addition to the cost-benefit analysis, which will be conducted for all VISD educational programs.

COMPENSATORY AND ALTERNATIVE EDUCATION

Districts receive compensatory education dollars from the state to bring students at risk of dropping out of school up to grade level with respect to basic academic skills. Schools can spend this money in

various ways. For example, the 78th Legislature amended Chapter 29, Subchapter C, 42.152 of the Texas Education Code to allow districts to use compensatory education funds for students enrolled in accelerated reading programs and programs for treating students with dyslexia. Districts must use up to 85 percent of compensatory education funds for direct costs, and up to 18 percent of funds used for direct costs may be used for disciplinary alternative education programs. Districts may also use 10 percent of state compensatory education funds for programs serving students who meet local (but not state) criteria for being at risk of dropping out. VISD has not added local criteria for at-risk student identification and uses state criteria only.

VISD uses its compensatory education dollars to fund 10 long-term programs. **Exhibit A–14** shows the number of personnel and the total budget for each long-term program funded through compensatory education.

For 2001–02, the state required school districts to have an external audit completed on their compliance with state compensatory education requirements. VISD's audit was positive in terms of the percent of money spent according to legislative rules. VISD also did well in terms of classifying students as at-risk; the audit revealed only one exception from a sample of 29 students. The audit examined five program classifications of compensatory education spending. **Exhibit A–15** shows the five program classifications and the FTEs funded at each campus by compensatory education funds. As this exhibit shows, only one school, Mitchell Guidance Center, is funded under the program classification of disciplinary alternative education program (DAEP).

Exhibit A–16 shows the district's 2001–02 analysis of allocation of resources for state compensatory education. This exhibit shows that VISD spent \$41,499, or 6.4 percent, of local funds and \$606,791, or 93.4 percent, of state funds (i.e., compensatory education funding) on its disciplinary alternative education program. The district used 13.5 percent of compensatory education funds for indirect costs, less than the 15 percent allowed by state law. The district was spending less of its compensatory education funds for its DAEP than its alternative education program (AEP).

VISD has three disciplinary alternative education programs and one alternative education program. **Exhibit A–17** shows the district's alternative education programs and the number of students served in each for 2003–04. As this exhibit shows, slightly more students were served in the alternative

EXHIBIT A-14
PROGRAMS FUNDED BY COMPENSATORY EDUCATION
FUNDS ON A LONG-TERM BASIS
2003-04

PROGRAM NAME AND DESCRIPTION	NUMBER AND TYPE OF PERSONNEL	TOTAL BUDGET
<i>Profit Academic Center for Success:</i> Individualized alternative education school for students in grades 9 through 12. Approximately 200 students attend.	12 teachers 1 administrator 1 counselor 6 paraprofessionals	\$580,349
<i>Mitchell Guidance Center:</i> Disciplinary alternative school for students with behavior problems and severe infractions.	9 teachers 2 administrators 1 counselor 7 paraprofessionals	516,612
<i>Content Mastery Program:</i> Designed for students who do not qualify for special education but are having learning difficulties. Split funded with special education to serve students. Currently eleven schools have content mastery programs.	5 teachers 13 paraprofessionals	334,791
<i>RESQs Program:</i> Enables over-aged students to return to school and work at his or her own pace to graduate or catch up with his or her age peers. Housed at the high school campus.	3 teachers 1 paraprofessional	214,528
<i>Juvenile Detention Center:</i> Serves students placed by the courts due to infraction of the law.	2 teachers 1 paraprofessional	132,527
<i>Attendance Officer:</i> Designed to get students in school on a daily basis.	2 social services 1 paraprofessional	114,264
<i>Supplemental Dyslexia Personnel and Services:</i> Trains classroom teachers in interventions for dyslexic students.	2 specialists 1 paraprofessional	111,111
<i>Staff Development:</i> Includes sessions on reading, math, and writing strategies and the effects of generational poverty on the learning of students.	0 personnel	21,500
<i>Tutorials:</i> Provides additional assistance for students at the elementary level.	0 personnel	7,000
Total		\$2,032,682

SOURCE: VISD assistant superintendent for Curriculum and Instruction, April 2004.

education program than the disciplinary alternative education programs.

Mitchell Guidance Center (MGC) is the primary DAEP in the district. MGC serves students in grades 6 through 12. Profit Academic Center, the district's alternative education program of choice, serves students in grades 9 through 12. **Exhibit A-18** shows the number of students served at both campuses by grade for 2003-04. This exhibit shows that about half the students at the DAEP were middle school students.

Students are placed in disciplinary alternative education settings for several reasons. These can be sorted into two broad categories: zero tolerance incidents and severe persistent misbehaviors (SPM). Discipline incidents categorized as zero tolerance include alcohol and substance abuse, assault, felony, gang related activity, threat, theft, and possession of a weapon. Severe persistent misbehaviors consist of repeated disciplinary incidents, such as disruptive behavior and violating the school code.

Approximately 45 percent of DAEP placements are due to SPM and 55 percent are due to zero tolerance. **Exhibit A-19** shows the number and percent of

DAEP placements by incident type by campus (only middle and high schools send students to MGC).

CURRICULUM AND INSTRUCTION MANAGEMENT

The use of block scheduling in high schools peaked from the mid 1990s to the early 2000s. In 1997, 43 percent of Texas public high school had implemented some form of block scheduling. While there are many models of block scheduling, all are intended to enhance student learning by providing longer periods of instructional time.

Proponents of block scheduling claim that it reduces fragments in instruction by providing longer periods of instructional time, expands opportunities for effective instructional methods, and allows for more opportunities for individualized instruction. Critics state that block scheduling affects students' ability to attend to instruction and undermines learning retention by introducing gaps between sequential courses.

The TEA conducted a study of block scheduling in high schools in 1999. Specifically, the study examined the effect of different types of high school schedules in conjunction with the school context on aggregate

**EXHIBIT A-15
VISD AUDIT OF AGREED-UPON PROCEDURES ON
STATE COMPENSATORY EDUCATION REQUIREMENTS
2001-02**

CAMPUS	DAEP: ACTIVITIES RELATED TO BASIC SERVICES		AEP: ACTIVITIES RELATED TO SUPPLEMENTAL COSTS		DAEP: ACTIVITIES RELATED TO SUPPLEMENTAL COSTS		TITLE I, PART A: ACTIVITIES RELATED TO COMPENSATORY EDUCATION		OTHER ACTIVITIES RELATED TO COMPENSATORY EDUCATION	
	FTE	DOLLAR AMOUNT	FTE	DOLLAR AMOUNT	FTE	DOLLAR AMOUNT	FTE	DOLLAR AMOUNT	FTE	DOLLAR AMOUNT
ELEMENTARY SCHOOLS										
Aloe							2.0	\$57,800		
Chandler									3.1	70,000
Coleto Creek										
DeLeon									1.6	66,100
Dudley							3.0	87,000		
F W Gross							2.0	56,500		
Guadalupe							1.5	35,800		
Hopkins							4.5	129,000		
Juan Linn							3.0	68,000		
Mission Valley									3.0	70,000
Connor							2.0	56,000		
Rowland							2.9	78,100		
Shields							5.3	141,600		
Smith									5.2	95,200
Vickers									2.6	63,000
William Wood									0.5	25,000
MIDDLE SCHOOLS										
Crain										
Howell									1.6	20,000
Patti Welder									1.0	11,500
ALTERNATIVE EDUCATION PROGRAMS										
Mitchell Guidance Center	18	648,240								
Profit Academic Center for Success			15.5	610,000						
Juvenile Detention Center			2.0	134,059						
HIGH SCHOOLS										
MHS: Stroman Campus									5.0	120,000
MHS: Senior Campus									10.5	314,000
District Totals	18	\$648,240	17.5	\$744,059			26.2	\$709,800	34.1	\$854,800

SOURCE: Bumgardner, Morrison & Company, L.L.P., 2001-02 VISD Agreed-Upon Procedures on State Compensatory Education Requirements.

**EXHIBIT A-16
ANALYSIS OF ALLOCATION OF RESOURCES FOR STATE COMPENSATORY EDUCATION
2001-02**

PROGRAM CLASSIFICATION/CALCULATION	AMOUNT PER PROGRAM	TOTAL AMOUNT
State Compensatory Education Allotment		\$3,371,061
AEP Supplemental	\$744,059	
DAEP Supplemental		
Title I, Part A, Campus with 50% or More Educationally Disadvantaged Students	\$709,800	
Other	\$854,800	
Total of rows 2 through 5		\$2,308,659
Total amount left before DAEP Basic Services		\$1,602,402
DAEP Basic Services or SCE allotment times 18% (whichever is less)	\$606,791	
Total Variance-Amount in excess of SCE allotment including DAEP Basic Services		\$455,611

SOURCE: Bumgardner, Morrison & Company, L.L.P., 2001-02, VISD Agreed-Upon Procedures on State Compensatory Education Requirements.

EXHIBIT A-17
NUMBER AND PERCENT OF VISD STUDENTS IN
ALTERNATIVE EDUCATION PROGRAMS
2003-04

ALTERNATIVE EDUCATION PROGRAM	NUMBER	PERCENT OF TOTAL STUDENT ENROLLMENT
Juvenile Center for Academic Achievement	16	0.1%
Juvenile Detention Center	21	0.1%
Mitchell Guidance Center	102	0.7%
Profit Academic Center for Success	167	1.2%
Total	306	2.1%

SOURCE: Texas Education Agency, PEIMS Student Data, 2003-04.

student performance. Results of the study indicated that school context factors were the most significant factors in explaining student performance. These included school size, district type, student characteristics, staff demographics, and student attendance rates. The contextual variable influencing student performance to the greatest degree was student attendance. TEA reported that 1995-96 attendance rates were lowest in schools with traditional six period and accelerated block schedules. Schools with the highest attendance rates were those that had a modified A/B block, traditional eight periods, or traditional seven-period schedules. After controlling for context, the study found that high school schedules used in Texas public schools did not explain or account for variation in student performance. The factor that influenced students' performance to the greatest degree was how effectively students and teachers engage in the teaching-learning process, regardless of the length of the class period.

SPECIAL PROGRAMS

All districts are faced with the challenge of providing programs for students with special needs. These programs allow a district to provide educational programs that are most beneficial for individual

EXHIBIT A-18
VISD NUMBER OF STUDENTS SERVED
AT MITCHELL GUIDANCE CENTER AND
PROFIT ACADEMIC CENTER BY
GRADE LEVEL
2003-04

GRADE	NUMBER	
	MITCHELL GUIDANCE CENTER	PROFIT ACADEMIC CENTER
6	7	0
7	15	0
8	25	0
9	18	27
10	30	47
11	*	56
12	*	37
Total	102	167

SOURCE: Texas Education Agency, PEIMS, 2003-04.
 NOTE: * These data were masked due to privacy laws.

students in terms of instructional level, student interest, and/or identified need. Many of these programs may be combined with regular classroom programs (based on individual needs) that provide for a more complex education and integration with other students. Special programs include Career and Technology Education, Gifted and Talented Education, Bilingual Education, Special Education, and Athletics and Extracurricular Activities.

VISD offers bilingual classes for children in grades pre-K through 2 at Smith Elementary and Pre-K through 5 at F.W. Gross and Hopkins elementary schools. Hopkins Elementary also offers a bilingual class for grades 4 and 5. English as a second language (ESL) services are offered to children in grades pre-K through 12 at all VISD campuses. When a child is identified as needing bilingual classes, the parents are given the option of sending the child to a bilingual campus to receive these services. However, if the parent chooses not to send their child to the bilingual campus, the child is offered ESL services at their home campus.

VISD also offers assistance to high school students; Profit Academic Center provides recent immigrant ESL classes for grades 9 through 12, and Memorial High School offers ESL classes for continuing Limited English Proficient (LEP) students.

VISD uses language proficiency assessment committees (LPAC) at the campus level to recommend the placement and instructional program for LEP children. At the elementary level, the LPAC is composed of a professional bilingual educator, a professional transitional educator, a parent of an LEP student, and a campus administrator (Board Policy EHBE [Legal]). District policy states that at the secondary level, an ESL educator may substitute for the bilingual educator and a counselor or administrator may substitute for the transitional educator. Responsibilities of the LPACs include the following:

- identify, classify, categorize, and place students in the appropriate program of instruction;

EXHIBIT A-19
STUDENT PLACEMENT IN DAEP: MITCHELL GUIDANCE CENTER BY
TYPE OF DISCIPLINARY INCIDENT BY CAMPUS
2003-04

CAMPUS	ZERO TOLERANCE		SEVERE PERSISTENT MISBEHAVIORS	
	NUMBER	PERCENT	NUMBER	PERCENT
MHS: Senior campus	50	60.2%	33	39.8%
MHS: Stroman campus	97	44.5%	121	55.5%
Profit Academic Center for Success	6	75.0%	*	25.0%
Crain MS	71	74.0%	25	26.0%
Howell MS	37	71.2%	*	28.8%
Patti Welder MS	73	50.3%	72	49.7%
Total	334	55.5%	268	45.5%

SOURCE: VISD assistant director Mitchell Guidance Center, April 2004.
 NOTE: * These data were masked due to privacy laws.

- review each LEP student’s progress at the end of each year;
- discuss TAKS exemptions, discuss monitored students, and to exit students from the program;
- monitor the progress of exited LEP students for two years; and
- determine the appropriateness of a program that extends beyond the regular year.

The State Programs coordinator, who reports to the assistant superintendent for Curriculum and Instruction, is responsible for the day-to-day oversight of the bilingual and ESL programs.

VISD offers services to its special education students in a variety of instructional settings. In 2003-04, 1,731 students were served in the special education program. Of these 1,731 students, 938, or 54.2 percent, were either in mainstreamed settings or resource rooms for less than 50 percent of the time. Exhibit A-20 shows the number and percent of students identified as special education by their primary disability.

Exhibit A-21 shows the number and percent of special education students by ethnicity. As this exhibit illustrates, the percent of students in each

EXHIBIT A-20
NUMBER AND PERCENTAGE OF SPECIAL
EDUCATION STUDENTS BY PRIMARY
DISABILITY
2003-04

PRIMARY DISABILITY	NUMBER	PERCENT
Orthopedic Impairment	23	1.3%
Other Health Impairment	161	9.3%
Auditory Impairment	24	1.4%
Visually Impaired	*	0.6%
Mental Retardation	156	9.0%
Emotional Disturbance	149	8.6%
Learning Disability	770	44.5%
Speech Impairment	357	20.6%
Autism	31	1.7%
Traumatic Brain Injury	*	0.2%
Noncategorical Early Childhood	45	1.3%

SOURCE: Texas Education Agency, PEIMS, 2003-04.
 NOTE: * These data were masked due to privacy laws.

EXHIBIT A-21
NUMBER AND PERCENT OF SPECIAL
EDUCATION STUDENTS BY ETHNICITY
2003-04

ETHNICITY	NUMBER	PERCENT IN SPECIAL EDUCATION	PERCENT IN DISTRICT
Native American	6	0.3%	0.3%
Asian Pacific	7	0.4%	0.9%
African American	181	10.5%	8.4%
Anglo	580	33.5%	37.2%
Hispanic	957	55.3%	53.2%

SOURCE: Texas Education Agency, PEIMS, 2003-04.

ethnic group served in special education reflects the demographics of the district.

Recently, the Special Services Department hired a behavior coordinator. The coordinator’s primary duties are to design and implement programs for students with challenging behaviors and provide staff development and technical assistance to school personnel at the campus and district level.

CAREER AND TECHNOLOGY
EDUCATION

Public schools in Texas are required by law to offer programs that will assist students in gaining entry-level employment or continuing their education at the post-secondary level. Specifically, Texas Education Code (TEC), Section 29.181 states, “Each public school student shall master the basic skills and knowledge necessary for managing the dual roles of family member and wage earner; and gaining entry-level employment in a high-skill, high-wage job or continuing the student’s education at the post-secondary level.” The Texas Administrative Code, Chapter 74, Subchapter A, requires school districts to offer “courses selected from at least three of the eight career and technology areas (agricultural science and technology education, business education, career orientation, health science technology education, family and consumer sciences education/home economics education, technology education/ industrial technology education, marketing education, and trade and industrial education) taught on a

campus in the school district with provisions for contracting for additional offerings with programs or institutions as may be practical.”

VISD’s CATE program offers seven programs (called ‘Academic Concentrations’ in the course selection guide) and 81 courses within those programs. CATE programs are offered at the high school level only.

VISD has a Career Development School (CDS) that shares space with the administration offices and Profit Academic Center. CATE courses are offered at the CDS and the high school campuses. **Exhibit A–22** shows the CATE courses offered at each campus.

State accountability requirements define three categories for students enrolled in CATE programs: code 1 refers to students who took a CATE course, but were not following a coherent sequence of courses in CATE; code 2 refers to students enrolled in a sequential course of study leading to a career concentration; and code 3 refers to students who

followed a state approved Tech Prep high school plan of study. School districts receive more funding for students classified as code 2 or code 3 than for those classified as code 1. **Exhibit A–23** shows a breakdown of VISD students by ethnicity and by CATE category. As this exhibit shows, most students were code 1, enrolled but not following a coherent sequence of courses. The ethnic distribution of students taking CATE courses reflects the district’s ethnic distribution.

The CATE Department has articulation agreements with two colleges: Victoria College and Texas State Technical College. An articulation agreement is a formal written contract between a district and a postsecondary institution specifying which secondary courses will be accepted for transfer to the college. The courses for which credit is accepted at Victoria College and Texas State Technical College under the articulation agreements are indicated in **Exhibit A–24**.

VISD’s CATE program is in transition. In January 2004, the director of the CDS resigned. Currently,

**EXHIBIT A–22
CATE COURSES OFFERED AT THE CAREER DEVELOPMENT SCHOOL,
MHS SENIOR CAMPUS, AND MHS STROMAN CAMPUS
2003–04**

PROGRAM/COURSE	CDS	SENIOR	STROMAN
Business Education			
Accounting I		X	
Business Communications		X	
Business Computer Information Systems I		X	X
Business Computer Information Systems II		X	
Business Law		X	
Desktop Publishing			X
International Business			
Introduction to Business		X	X
Notetaking and Study Skills			
Principals of Marketing		X	
Retailing		X	
Record Keeping		X	X
Criminal Justice			
Criminal Justice I		X	
Criminal Justice II		X	
Criminal Justice III		X	
Criminal Justice IV		X	
Family and Consumer Sciences			
Apparel		X	X
Child Care, Guidance, Management & Services		X	
Child Development		X	
Food Science and Technology		X	X
Food Technology		X	X
Individual and Family Life		X	X
Interior Design		X	
Nutrition and Food Science		X	
Personal and Family Development		X	X
Preparation for Parenting			X
Textile and Apparel Design			
Health Science Technology			
Health Science Technology II		X	
Health Science Technology III		X	

**EXHIBIT A-22 (CONTINUED)
CATE COURSES OFFERED AT THE CAREER DEVELOPMENT SCHOOL,
MHS SENIOR CAMPUS, AND MHS STROMAN CAMPUS
2003-04**

PROGRAM/COURSE	CDS	SENIOR	STROMAN
Technology Education			
Architectural Graphics		X	
Computer Applications		X	
Construction Systems	X		X
Engineering Graphics		X	
Engineering Principles		X	
Problems and Solutions in Technology		X	
Research, Design, and Development		X	
Technology Systems			X
Technology Systems- Modular Computer Laboratory-Based		X	
TELCOM 1 (CISCO)	X		
TELCOM 2 (CISCO)	X		
TELCOM 3 (CISCO)	X		
TELCOM 4 (CISCO)	X		
Video Technology		X	X
Technical Education			
Automotive Collision Repair I	X		
Automotive Collision Repair II	X		
Automotive Technician I	X		
Automotive Technician II	X		
Building Trades I	X		
Building Trades II	X		
Computer Design, Maintenance & Repair I	X		
Computer Design, Maintenance & Repair II	X		
Cosmetology I	X		
Cosmetology II	X		
Electrical Trades I	X		
Plant and Animal Production			X
Range Management		X	
Wildlife and Recreation		X	
Wildlife and Recreation Management		X	
Work Based Cooperative Program			
Administrative Procedures I		X	
Administrative Procedures II		X	
Health Career Preparation I		X	
Health Career Preparation II		X	
Home Economics Career Preparation I		X	
Home Economics Career Preparation II		X	
Marketing Education Career Preparation I		X	
Marketing Education Career Preparation II		X	
Trade and Industrial Career Preparation I		X	
Trade and Industrial Career Preparation II		X	
Total	21		

SOURCE: VISD interim director of Career Development School, April 2004.

the program is under the supervision of an interim director who previously served as the CATE Special Populations coordinator for seven years. The interim director of the CDS has implemented several changes to improve CATE offerings. some of these changes include the following:

- Pursued articulation agreements with Coastal Bend College in Beeville and Delmar College in Corpus Christi for the criminal justice courses. Victoria College has dropped its articulation agreement with VISD for these courses because it requires a teacher of these courses to have a master’s degree.

- Added an additional course to the CISCO program called IT Essentials II or Server Plus Curriculum. This course utilizes Microsoft windows server, and Server Plus curriculum will be available to students in fall 2004.
- Developed a process to ensure proper coding of CATE students and is working with CATE personnel to implement this process to ensure that VISD receives maximum allowable funding.
- Developed a process to ensure that all students who leave school after block 2 are enrolled in a

**EXHIBIT A-23
NUMBER AND PERCENTAGE OF VISD
STUDENTS IN CATE COURSES BY ETHNICITY
AND PEIMS CODE
2003-04**

ETHNICITY	CODE 1		CODE 2		CODE 3	
	N	%	N	%	N	%
Hispanic	1,009	53.8%	188	58.2%	310	44.2%
Anglo	682	36.4%	112	34.7%	337	48.1%
African American	172	9.2%	*	6.5%	*	6.6%
Asian Pacific	*	0.4%	*	0.6%	*	1.1%
Native American	*	0.2%	0	0.0%	0	0.0%

SOURCE: VISD PEIMS Coordinator, April 2004.

NOTE: * These data were masked due to privacy laws.

work cooperative course; currently working with the high school counselors on this process.

- Examined all courses to ensure that local area employment opportunities are available for students, including e-commerce and global positioning systems.
- Suggested updates and improvements to CATE positions to better meet the needs of students.

GIFTED AND TALENTED EDUCATION

Section 29.122 of the TEC states that school districts “shall adopt a process for identifying and serving gifted and talented students in the district and shall establish a program for those students in each grade level.” Section 29.123 requires the State Board of Education (SBOE) to “develop and periodically

update a state plan for the education of gifted and talented students” to be used for accountability purposes “to measure the performance of districts in providing services to students identified as gifted and talented.” The SBOE plan, adopted in 1996 and revised in 2000, provides direction for the refinement of existing services and the creation of additional curricular options for gifted and talented students.

The *Texas State Plan for the Education of Gifted/Talented Students* establishes three levels of performance measures—acceptable, recognized, and exemplary—for five program areas: student assessment, program design, curriculum and instruction, professional development, and family-community involvement. “Acceptable” performance measures are those required by state law or rule. The “recognized” and “exemplary” measures are provided as “viable targets

**EXHIBIT A-24
VISD CATE ARTICULATION AGREEMENTS**

COLLEGE	COURSES
Victoria College	Child Development and Preparation for Parenting Accounting I Business Computer Information Systems I Business Computer Information Systems II Telecommunication Technology I Telecommunications Technology II Business Computer Programming Engineering Graphics Computer-Aided Drafting Engineering and Architectural Drafting Petrochemical Process Technician Technical Introduction to Desktop Publishing Word Processing Applications Agricultural Structures Technology Agricultural Metal Fabrication Technician Health Science Technology I Anatomy and Physiology for Human Systems Clinical Nutrition
Texas State Technical College	Auto Collision and Management Technician Automotive Technology Computer Maintenance Computer Networking-CISCO EEC Core Food Service and Culinary Arts Welding Technology

SOURCE: VISD, interim director of Career Development School, April 2004.

that local district educators seeking excellence, both for their district and for its students, may strive to attain.”

VISD serves students who are identified as gifted and talented (G/T) in grades K through 11. Students in kindergarten are identified in March and served on their home campus. Elementary students in grades 1 through 5 are served at Dudley Elementary Magnet School. Students are served through a modified School Enrichment Model (SEM). The main features of SEM include acceleration within a grade and across grades, adding complexity and depth to the curriculum, and allowing students to study in areas of interest. Middle school students identified as G/T are served in the four content areas of language arts, mathematics, social studies, and science. At the high school level, identified students are served in the advanced placement program.

STUDENT SERVICES

Student services encompass counseling, media/library services, health services, and social services in most Texas districts. The services provided may include the following:

- college and career counseling;
- health education and health services;
- substance abuse and psychological counseling;
- social services;
- library services; and
- graduate follow-up studies.

Recently, these services have played a more important role in helping students cope with the complexities of the modern world. The role of the educational community in providing needed assistance for career and individual needs will continue to grow in future years.

COUNSELING

The 1996–2000 Long Range Plan of the State Board of Education for Public School Education includes the State Board of Education’s goal to provide all Texas students with equal access to developmental guidance and counseling. Chapter 21.356 of the Texas Education Code requires the commissioner of Education to develop and periodically update a counselor job description in consultation with the state guidance association.

In 1998, TEA published *A Model Developmental Guidance and Counseling Program for Texas Public Schools*. The guide addresses the program balance to be achieved by allocating resources to four components of developmental guidance and counseling:

- Guidance Curriculum – planned lessons covering seven areas, including self-confidence development, motivation to achieve, decision-making and problem-solving skills, and responsible behavior. School counselors may teach all or some of the curriculum through direct instruction or may consult with teachers who integrate the curriculum into the classroom.
- Responsive Services – interventions on behalf of students whose immediate personal concerns or problems put their continued personal-social, career, and/or educational development at risk. Counselors may meet with individuals or groups of students as indicated in the particular setting.
- Individual Planning – guidance for students as they plan, monitor, and manage their own educational, career, and personal-social development. Counselors may perform activities such as conducting group guidance sessions, interpreting standardized test results, and consulting with individual students and their parents regarding colleges and financial aid.
- System Support – services and management activities that indirectly benefit students. Counselors may consult with teachers, participate in the development of school-based school improvement plans, and support parent and community relations efforts.

The guide recommends that school counselors divide their time between these four components depending on the developmental and special needs of the students served, with the amount of counselor time devoted to each component to be determined by each district or school. Allocations will vary, but TEA’s suggested allocations are shown in **Exhibit A–25**.

HEALTH SERVICES

Children cannot perform well academically if they are unhealthy, undernourished, have vision or hearing problems, have serious emotional problems, or abuse drugs or alcohol. By preventing or alleviating health problems, coordinated school health programs serve

**EXHIBIT A–25
RECOMMENDED PERCENTAGE
DISTRIBUTION
OF COUNSELOR SERVICES BY LEVEL**

SERVICE TYPE	ELEMENTARY	MIDDLE SCHOOL	HIGH SCHOOL
Guidance Curriculum	35–45%	35–40%	15–25%
Responsive Services	30–40%	30–40%	25–35%
Individual Planning	5–10%	15–25%	25–35%
System Support	10–15%	10–15%	15–20%

SOURCE: TEA, *A Model Developmental Guidance and Counseling Program for Texas Public Schools*, 1998.

the primary mission of schools. Quality school health programs result in the following benefits:

- reduced absenteeism;
- fewer behavior problems in the classroom;
- improved student performance;
- higher test scores;
- more alert students;
- more students with positive attitudes;
- increased health awareness in children's daily lives; and
- more cooperation among parents, community organizations, and teachers.

No federal or state law mandates that Texas school districts provide health services for students without disabilities. However, because an estimated 25 percent of Texas children ages 18 and under have no health insurance, a school nurse may be the only health professional they see.

School boards have discretion over which health services are provided and how they are provided. Before 1991, TEA played a major role in monitoring school health programs. Since 1992, however, the Texas Department of Health (TDH) has implemented a School Health Program that provides consultant services to public schools and information and resources to school personnel. TDH also makes competitive grant awards to communities for school-based health centers.

LIBRARY AND MEDIA SERVICES

In 2000, the Southern Association of Colleges and Schools (SACS) developed a set of accreditation standards for library media services. The principle guiding the standards is that "an effective school provides access to a balanced, up-to-date, and well-maintained collection of library media resources to support the curriculum." The standards offer criteria that specify the size of the collection in terms of books, periodicals, and instructional technology. In addition, the standards specify the number of library or media specialists a school must employ to support and facilitate student learning.

Standards were also developed that are applicable only to Texas. In May 1997, the Texas State Library and Archives Commission adopted a series of recommended standards published as School Library Program Standards: Guidelines and Standards. The goal of school library programs, as outlined in Guidelines and Standards, is to ensure that students and staff alike effectively use ideas and information and become literate, life-long learners. To accomplish this task, the library program should provide instruction in research and the evaluation of

resources, individual guidance, and access to materials in multiple formats. The guidelines offer criteria that identify library programs as exemplary, recognized, acceptable, or below standard in the areas of the library learning environment, curriculum integration, resources, library program management, and facilities.

All VISD campuses have a library except MGC and Profit Academic Center and a total of 20 libraries. The district does not have a coordinator of Library Services. Instead, the assistant superintendent for Curriculum and Instruction oversees the library functions for the district.

**CHAPTER 2
DISTRICT ORGANIZATION**

VISD is governed by an elected seven-member board of trustees. Two trustees are elected from super districts, while the remaining five are elected from single-member districts. Board members serve three-year staggered terms, with elections held annually. **Exhibit A-26** shows each board member, the year they were initially elected to the board, and their term of office.

Elections held on May 15, 2004, returned two incumbent board members and brought one new member to the Board of Trustees. H. Ray Walden was re-elected for a second term, and Bernard Klimist was elected to his first full term, as he was appointed to the board in 2003 to fill a vacancy left by a board member who resigned. James Murphy, Sr. was elected to the District 1 position. Mr. Murphy is a former VISD trustee, having served a term from 1989 to 1992.

In addition, Board Member Dr. Estella De Los Santos was appointed to the board on June 17, 2004, to fill a vacancy created in May when Milton Stolis, an eight-year board member, resigned. Dr. De Los Santos is a professor in the Education Division of the University of Houston Victoria (UHV). Prior to taking her position at UHV, she taught in VISD for 14 years.

Regular board meetings are held on the third Thursday of each month at 6:00 PM in the VISD Board Room, located at 102 Profit Drive. In addition to regular meetings, the board holds several workshops and special meetings throughout the year to discuss the budget or other significant issues. In accordance with board policy BED (Local), the public is allowed to comment at board meetings in two sections. Section I allows for public comments on specific agenda items, whereas Section II, limited to a total of 15 minutes, allows members of the public to comment on non-agenda items.

The superintendent and board president create each meeting's agenda. A board member can request an agenda item by notifying the board president. Any

staff member can request an agenda item by notifying the superintendent, who then decides whether to add it to the agenda. The meeting notice is posted in the administration building 72 hours before the meeting, as required by law.

The secretary to the superintendent, who also serves as secretary to the board, is responsible for collecting, assembling, and copying all documentation given to board members in their board packets. Each board member receives his or her board packet on the Friday preceding a Thursday meeting.

Texas Education Code 11.061 authorizes school boards to create committees to facilitate their operations; the creation of committees is detailed in the district's board policy BDB (LEGAL). Such board committees must comply with the state's Open Meetings Act. VISD board policy stipulates that board committees must be advisory in nature, serving as fact-finding groups to make recommendations to the board as a whole. The board committees for 2003-04 include the following:

- Policy Committee – two board members with an alternate
- Facilities Committee – two board members with an alternate
- Insurance Committee – two board members
- Handbook/Code of Conduct Committee – one board member
- Strategic Plan Implementation - High School Configuration Committee – two board members with an alternate
- High School Scheduling Committee
- The board president serves as an ex officio member of all the board committees.

DISTRICT MANAGEMENT

Mr. Ronald Peace has served as the superintendent for VISD since April 2000 and has a contract through June 30, 2008. Prior to being hired as superintendent, Mr. Peace served as VISD's assistant to the superintendent and assistant superintendent

**EXHIBIT A-26
VISD'S BOARD OF TRUSTEES**

BOARD MEMBER NAME	POSITION	DISTRICT	TERM	YEAR ELECTED
James Murphy, Sr.	Member	District 1	2004-07	2004
Robert T. Treviño	Member	District 2	2003-06	1997
Ludvik J. Svetlik	Vice-President	District 3	2002-05	2002
Laura Smith	Member	District 4	2003-06	2000
Estella De Los Santos	Member	District 5	2004-07	2004 [#]
Bernard T. Klimist	President	District 6	2004-07	2003*
H. Ray Walden	Secretary	District 7	2004-07	2001

SOURCE: VISD, April 2004.

NOTES: * Appointed to fill a board vacancy in 2003.

[#] Appointed to fill a board vacancy in 2004.

for Facilities and School Services. In addition, he has also worked for the Texas Education Agency (TEA) and Dallas ISD, where he held the positions of teacher, assistant principal, principal, administrative assistant, and area coordinator. Mr. Peace earned his Master of Educational Administration from Prairie View A&M University and his Bachelor of Arts degree from Dillard University in Louisiana.

The superintendent’s contract specifies details such as compensation, professional development, benefits, and expense reimbursements. The contract also states that “The superintendent will submit to the board a preliminary list of goals in April of each year, or as soon thereafter as practicable.” **Exhibit A-27** shows the goals Mr. Peace presented to the board in 2004.

The superintendent’s contract requires that he receive an evaluation from the board at least annually. The contract states, in part, that “Evaluations of the superintendent shall be conducted in accordance with board policies BJCD (LEGAL) and (LOCAL), and in accordance with the TEC, and any other applicable rule, regulation or board policy...”

Instructional responsibilities are split among the three assistant superintendent positions, with the assistant in charge of Curriculum and Instruction responsible for testing and evaluation, curriculum, Special Education, federal and state programs, and magnet programs. All principals and guidance counselors report to the assistant superintendent for School Improvement as well as the director of Career and Technology Education (CATE). The district’s professional development functions also fall under School Improvement. The assistant

superintendent for School Administration is responsible for student discipline and the ancillary functions of Student Transportation and Child Nutrition.

The position of director of Plant Maintenance and Purchasing, which is responsible for purchasing, warehousing, risk management, and construction, in addition to maintenance, reports directly to the superintendent. The director of Athletics, the director of Personnel, and the chief financial officer also report directly to the superintendent. The chief financial officer is responsible for the Accounting and Finance functions of the district, including budget preparation, general ledger accounting, payroll, accounts payable, accounts receivable, fund accounting, and investment management and reporting. The mailroom responsibilities also fall to the chief financial officer.

The district’s computers and technology functions are divided into two areas: the Management Information Systems (MIS) Department is responsible for administrative and instructional technology and reports to Curriculum and Instruction, and the Information Technology Department, which handles the media lab and website maintenance, reports to School Improvement.

Three of the district’s executives retired during 2004, leaving the positions of assistant superintendent for Curriculum and Instruction, assistant superintendent for School Administration, and director of Personnel vacant.

VISD does not have an in-house legal department. Instead, the district maintains agreements with

**EXHIBIT A-27
VISD’S SUPERINTENDENT GOALS
2004-05**

GOAL NO.	GOAL
1	Ensure that academic performance at VISD campuses meets or exceed state accountability standards to be rated <i>Acceptable</i> and/or <i>Recognized</i> .
2	Ensure the financial integrity of Victoria ISD.
3	Maintain and expand communication efforts, internally and externally.
4	Continue to improve student attendance rate.
5	Continue long-range planning for facilities, service/program delivery, and finance.

SOURCE: VISD, Superintendent’s Office, February 2004.

**EXHIBIT A-28
VISD ATTORNEYS**

ATTORNEY	FEE ARRANGEMENT	TYPE OF SERVICES	DATE OF AGREEMENT
Cullen, Carsner, Seerden & Cullen, LLP	\$125 – \$150 per hour	General counsel, real estate, contracts	September 2002
Bracewell & Patterson	Various	Special Education	No agreement on file
Linebarger Goggan Blair & Sampson, LLP	15 % of delinquent tax collections	Delinquent tax collections	December 2002

SOURCE: VISD, Accounting Department, April 2004.

various law firms for legal services. **Exhibit A-28** shows a list of attorneys and the services they provide to the district.

PLANNING, BUDGETING, AND EVALUATION

Section 11.251 of the TEC requires the Boards of Trustees of Texas school districts to ensure that district improvement plans (DIP) and campus improvement plans (CIP) are developed, reviewed, and revised. The goals of the plans should be for the purpose of improving the performance of all students in the district.

School districts are required to develop a DIP annually. The purpose of a DIP is to guide districts and campus staff in the improvement of student performance for all student groups. The DIP must support the state goals and objectives for education that are identified in Chapter 4 of the Texas Education Code (TEC).

Section 11.253 (d) of the TEC requires that each school year, the principal of each campus, with the assistance of a campus-level committee, must develop, review, and revise their individual CIPs. The purpose of a CIP is to improve student performance on the state’s academic excellence indicators for all student populations, as well as improve performance on any other performance measures for special needs populations. The CIP must be supportive of the objectives of the DIP and must, at a minimum, support the state goals and objectives for education. At least every two years, each district must evaluate the effectiveness of the district’s decision-making and planning policies, procedures, and staff development activities related to district- and campus-level decision-making and planning to ensure that they are structured effectively to positively impact student performance.

Districts with strategic plans that have been developed with a broad base of input and that contain well defined goals will be better able to attain state standards in respect to academic excellence indicators. Evaluation of a district’s programs allows the board and administration to gauge the success of each program by determining if key objectives and results have been obtained and if the benefits warrant the costs. Planned programmatic changes can then be made based on those results.

State law mandates that the superintendent prepare, or cause to be prepared, the budget each year. Thus, the superintendent is responsible for preparing and presenting the preliminary budget to the board. The board’s role in approving the budget is critical, however, because it is through the budget that the priorities of the board are funded. Planning and

budgeting must be closely linked if plans are to be implemented and the goals of the district are to be accomplished.

VISD maintains a District Education Committee (DEC) and Site-Based Decision-Making (SBDM) Committees made up of staff, parents, and community members to participate in developing and monitoring the DIP and each campus’ CIP. The assistant superintendent for Curriculum and Instruction is responsible for overseeing the development and monitoring of the DIP and the CIPs.

The district maintains several policies that guide the responsibilities of these committees. Policy BQ (LEGAL) details the requirements of the district-wide decision-making process, as detailed in Section 11.252 of the TEC; policy BQB (LEGAL) covers the planning and decision-making process at the campus level; policy EA (LOCAL) specifies the procedures for setting instructional goals and objectives; and policy BQA-R (LOCAL) discusses the responsibilities of the DEC. The committee is required to meet at least four times per year. **Exhibit A-29** shows responsibilities and a timeline of the DEC as required by policy BQA-R (LOCAL).

**EXHIBIT A-29
VISD DISTRICT EDUCATION
COMMITTEE RESPONSIBILITIES
TIMELINE**

MONTH	ACTIVITY/RESPONSIBILITY
August	Attend training for SBDM committee members
September	Review district priority goals Review campus priority goals Review summative evaluation of prior year’s DIP
October	Elect officers Review policy changes, if any Review DIP Submit district and campus priority goals to the Board of Trustees Appoint members to calendar and policy committees
January	Conduct formative evaluation of DIP Review district’s Code of Conduct Review program evaluations Review process for recruiting culturally diverse staff Review calendars for district approval Hear report from policy committee members
May	Review staff development evaluation Recommend staff development waiver days Hear report regarding district’s financial condition Conduct summative evaluation of DIP

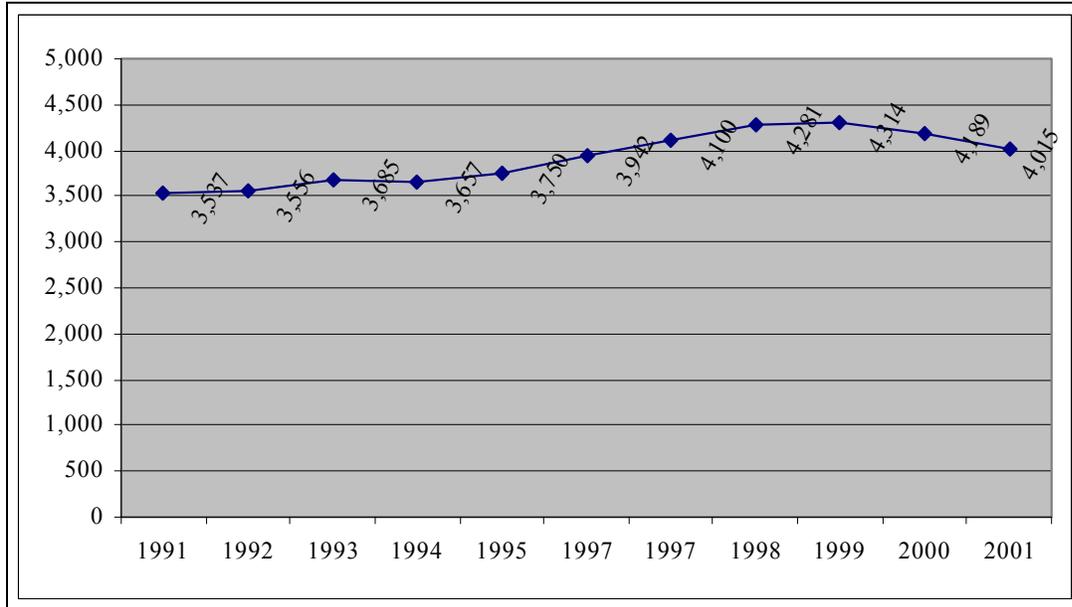
SOURCE: VISD, Board Policy BQA-R (LOCAL) and District Education Committee, revised May 2003.

Exhibit A-30 shows the enrollment trend of VISD’s high school(s) since 1991. As this chart shows, the district experienced a steady increase in enrollment until 2000, when enrollment began to decline.

Without a formal demographic study to determine whether this trend will continue and why, the district will not know whether it will need another high school facility.

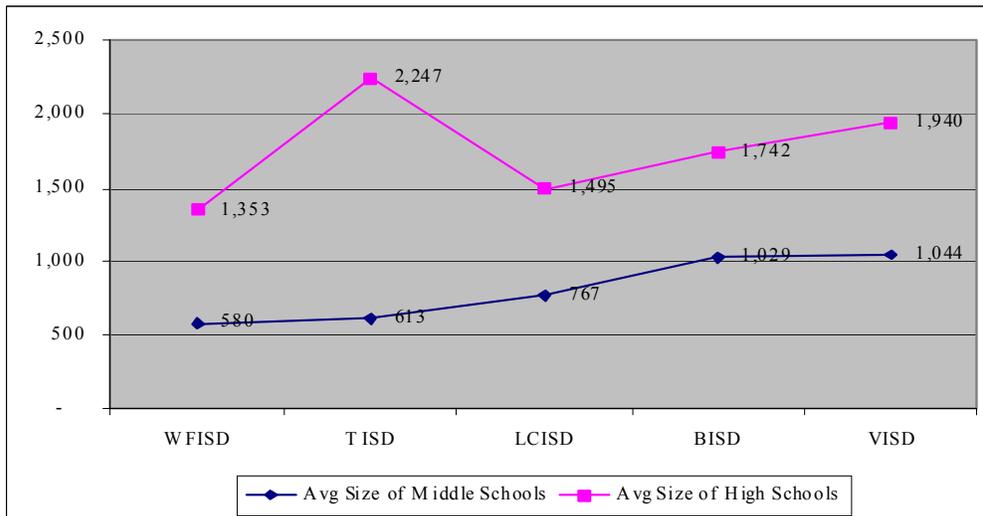
Conversely, the district’s middle schools have increased in size. **Exhibit A-31** shows a comparison of VISD and its peer districts’ average campus size for middle and high schools. Though the size of VISD’s high school campuses has been the center of focus in the strategic planning effort, this chart shows that VISD ranks second among its peers in the average size of its high school campuses, yet ranks first in having the largest average size for middle school campuses.

EXHIBIT A-30
VISD HIGH SCHOOL ENROLLMENT
1990-91 THROUGH 2000-01



SOURCE: An Evaluation of Year-One Implementation of the Consolidated Memorial High School: 2000-2001, VISD’s Curriculum and Instruction Department.

EXHIBIT A-31
AVERAGE CAMPUS SIZE FOR MIDDLE AND HIGH SCHOOLS
VISD AND PEER DISTRICTS



SOURCE: Texas Education Agency, PEIMS enrollment data, 2002-03.

**CHAPTER 3
COMPUTERS AND TECHNOLOGY**

VISD’s Management Information System (MIS) Department is responsible for the district’s entire information technology infrastructure, including the implementation, support, and administration of a wide area network (WAN) and a local area network (LAN) in both schools and administrative offices. In VISD, the director of MIS oversees the MIS Department, which consists of 17 full-time and one part-time personnel.

Exhibit A–32 compares VISD’s staffing levels to its peer districts. VISD has the highest student-to-technology staff ratio of the peer group.

VISD has a technology committee that consists of principals, teachers, directors, and assistant superintendents. This committee developed a 2004–06 district technology plan that has been approved by the Texas Education Agency (TEA).

The technology budget has steadily declined since 2000–01. **Exhibit A–33** lists technology expenditures from 1999–2000 through 2002–03. The \$1.1 million spent in 2002–03 translates into \$79 per student.

To meet its technology-related goals, a school district must use and support existing and new technologies

in its curriculum and administrative operations. In VISD, the MIS Department is broken down into three sections: PEIMS, Network/Technical Support, and Software Systems Support. The director of the MIS Department oversees the daily operations of the department. **Exhibit A–34** presents the MIS Department’s organization.

INFRASTRUCTURE AND HARDWARE OPERATIONS

VISD has 24 campuses that are connected to the central telephone company switch by T1 (1.5 megabit per second) network lines. Central administration connects to the same switch through a DS-3 speed (44.4 megabit per second) network line and five other locations where support services are housed. Every classroom has at least one network connection. All of the campuses and the central administration offices have access to email. Several campuses have videoconferencing equipment to allow for distance learning.

Exhibit A–35 illustrates wide area network (WAN) diagram of VISD.

**EXHIBIT A–32
VISD VS. PEER DISTRICTS
MAY 2004**

DISTRICT	ENROLLMENT	TOTAL TECHNOLOGY STAFF	STUDENT TO TECHNOLOGY STAFF RATIO
Victoria	14,439	17.5	825.1
Tyler	17,096	28.5	599.9
Lamar	17,063	22.0	775.6
Bryan	13,907	35.0	397.3
Wichita Falls*	N/A	N/A	N/A

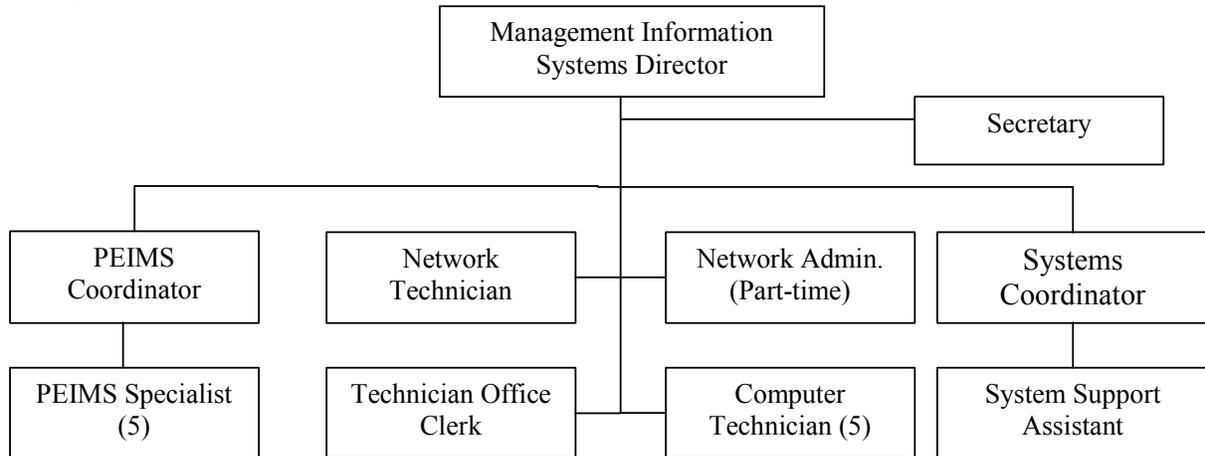
SOURCE: Peer district surveys and VISD Organization Chart, May 2004.
* Denotes no response to peer survey.

**EXHIBIT A–33
VISD TECHNOLOGY EXPENDITURES
1999–2000 THROUGH 2002–03**

YEAR	EXPENDITURES	ENROLLMENT	EXPENDITURES PER STUDENT
2002-2003	\$1,139,037	14,438	\$79
2001-2002	\$1,179,376	14,360	\$82
2000-2001	\$1,229,785	14,411	\$85
1999-2000	\$916,133	14,657	\$63

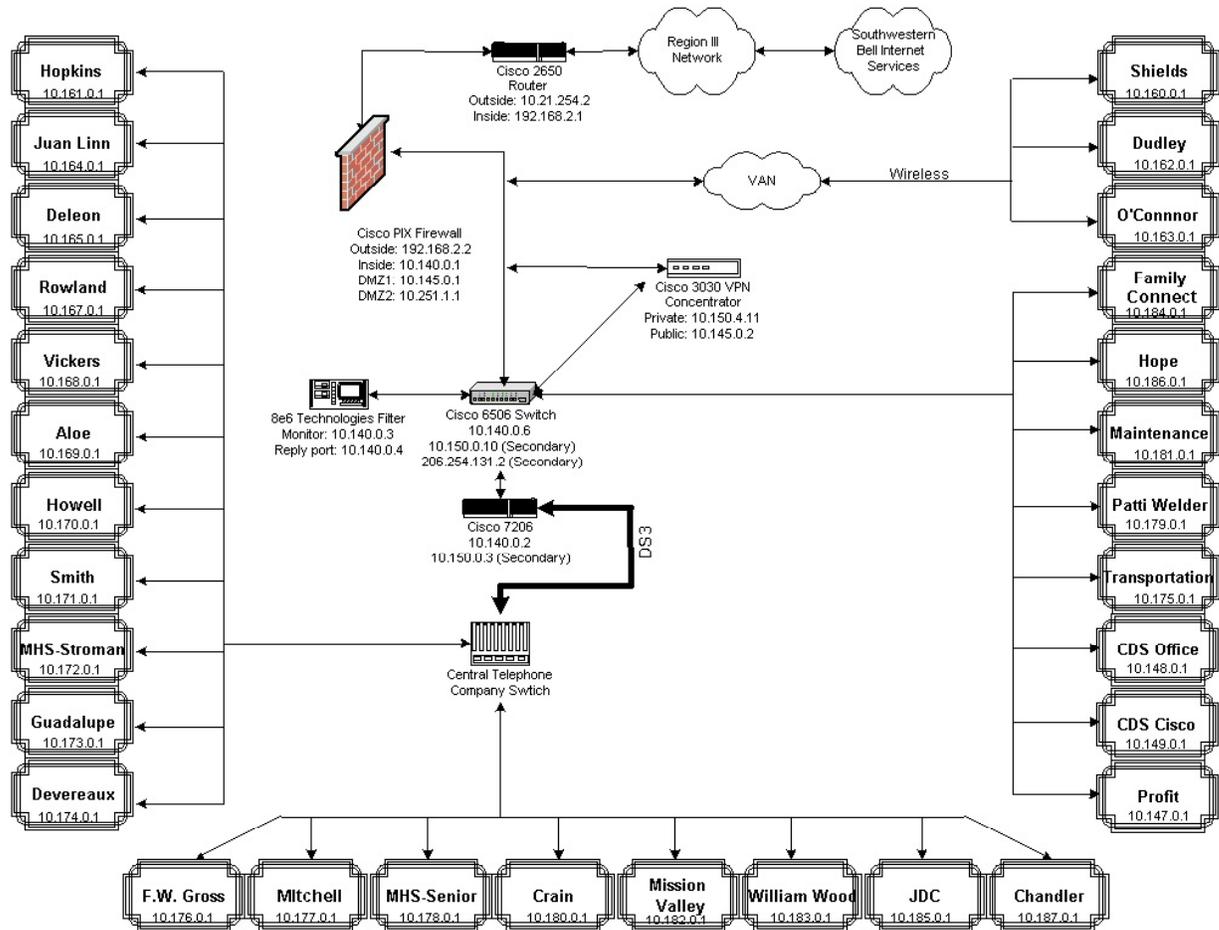
SOURCE: Texas Education Agency, PEIMS and AEIS, 1999–2000 through 2002–03.

**EXHIBIT A-34
MANAGEMENT INFORMATION SYSTEMS (MIS) DEPARTMENT ORGANIZATION
MAY 2004**



SOURCE: VISD, MIS Department, May 2004.

**EXHIBIT A-35
VISD WAN DIAGRAM**



SOURCE: MISD Department, May 2004.

**CHAPTER 4
HUMAN RESOURCES**

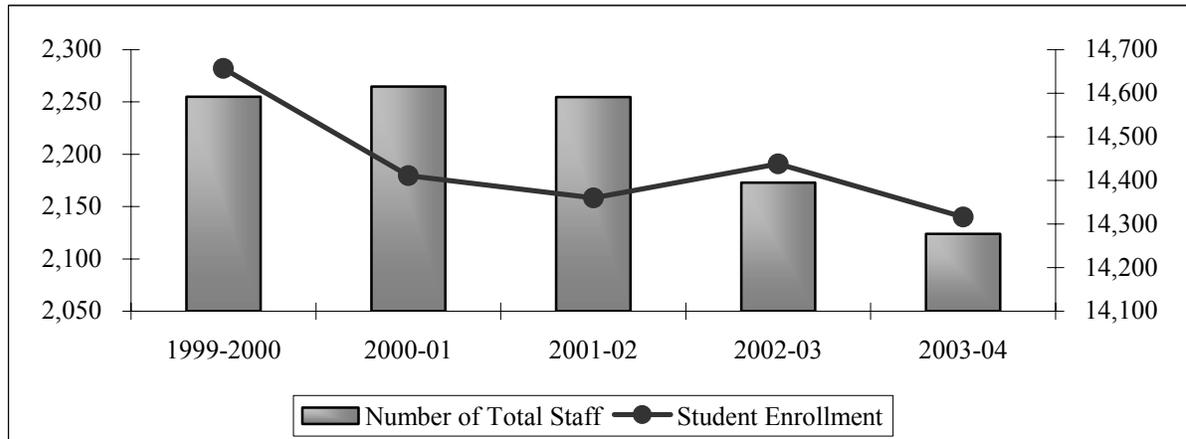
Chapter 21 of the Texas Education Code establishes education specific standards for pay, reporting new hires, educator qualifications, contractual relationships, performance evaluations, and training. The federal Fair Labor and Standards Act of 1938 (FLSA) sets additional legal requirements that regulate hiring practices, hours of work, minimum wages, benefits, and work environment. Effective personnel management requires that employers measure budget and program decisions against legal requirements and employee relations. District size, community values, economic conditions, competition for staff in surrounding districts, and numerous other factors affect the human resource decisions of a district. While each district has its own work environment, the human resource industry relies on comparisons and demographic information to measure the success of programs. VISD selected four districts, Bryan, Lamar Consolidated, Tyler, and Wichita Falls, to serve as its peer districts for comparative purposes.

Management of human resources by school districts varies throughout the state of Texas. Many school districts join the Texas Association of School Boards (TASB), a professional organization that provides management tools and support to member districts. Districts using TASB materials to support personnel processes usually have similar policies, position descriptions, and forms. VISD relies on TASB services for items such as forms, policies, position classification, and compensation.

When the Texas Education Agency (TEA) reviews the financial viability of school districts, one parameter it evaluates is how the district has responded to student enrollment trends with respect to its staffing levels. Some districts have ignored decreasing enrollment and either hired additional staff or kept its staffing levels constant, especially in terms of non-instructional staff. One reason for this practice is that few districts have developed staffing standards for non-instructional staff.

Over the last two years the district's staffing levels have tracked student enrollment trends, as shown in **Exhibit A-36**. Although the total staffing levels track student enrollment trends, when looking at each employee category separately some staffing groups have increased as student enrollment has decreased. Central administration staff has increased 56.4 percent over the last five years. This increase does not reflect an increase in the number of personnel. TEA mandates how school districts code staff types for its Public Education Information Management System (PEIMS) statewide database. Since 2001-02, the job categories defined under central administration have been expanded and now include job functions that were previously classified as either campus administrators or professional support. When evaluating the staffing trend from 2001-02 through 2003-04, the percentage increase in central administration falls to 10.7 percent, which translates to less than 2 full-time equivalents. Over the past five years, the number of campus administrators has increased 1.8 percent, and educational aides have increased by 2.6 percent.

**EXHIBIT A-36
VISD STAFFING VERSUS ENROLLMENT TRENDS
1999-2000 THROUGH 2003-04**



SOURCE: Texas Education Agency, Public Education Information Systems (PEIMS), for the years indicated.

Exhibit A–37 compares the district’s staffing levels to its peer districts. VISD staffing levels are all below the peer average, with the exception of central administration, educational aides, and auxiliary staff, which are 18.2 percent, 8.5 percent, and 12.9 percent higher, respectively. In comparing VISD’s staffing ratios to its peers, the district student-to-staff ratios are 29.9 percent lower for central administration, 19.8 percent lower for educational aides, and 23.9 percent lower for auxiliary staff. When student-to-staff ratios decrease, it translates to higher numbers of staff per student and is an indication that district staffing levels are not efficient. The district’s student teacher ratio is among the lowest of the peer group, but at the state average of 14.8:1.

Auxiliary staff includes bus drivers, maintenance and custodial personnel, food service workers, and clerical staff. **Exhibit A–38** compares auxiliary staffing levels by function between VISD and its peer districts. VISD is well above the peer average in the total number of auxiliary staff employed by the district. Two expenditure areas where the district does not compare favorably to its peers are instruction and plant maintenance and operations.

The district’s teaching staff has the highest average experience level of its peer group, two full years greater than the peer average. This is an issue the

district will have to address as more teachers become eligible for retirement. **Exhibit A–39** summarizes the average years of experience for the teaching staff of VISD and the four peer districts.

Exhibit A–40 compares VISD teachers by degree received with its peer districts. VISD has the second lowest number of teachers of the peer group, which corresponds to student enrollment numbers. However, the district has the highest number of teachers teaching without a degree. The director of Personnel told the review team that the district is actively working toward ensuring these teachers meet the certification standards through the alternative certification programs at Regional Education Service Center III (Region 3) and the University of Houston – Victoria. These teachers have been given specific timeframes by which they must complete their certification and meet the “highly qualified” standards set under the No Child Left Behind (NCLB) Act.

**EXHIBIT A-37
COMPARISON OF STAFFING LEVELS
VISD VERSUS PEER DISTRICTS
2003–04**

STAFFING CATEGORY	BRYAN	LAMAR CISD	TYLER	VICTORIA	WICHITA FALLS	PEER AVERAGE
Central Administration	22.9	14.3	15.4	18.8	11.0	15.9
Campus Administration	46.0	70.1	66.9	52.5	59.3	60.6
Teachers	935.3	1,155.4	1,253.1	969.7	1,112.9	1,114.2
Education Aides	193.2	253.4	318.9	287.5	293.9	264.9
Professional Support	204.3	202.5	227.3	169.6	188.9	205.8
Auxiliary	635.0	676.2	512.5	625.7	392.2	554.0
Total Staff	2,036.7	2,371.9	2,394.1	2,123.8	2,058.2	2,215.4
Enrollment	14,104	17,724	17,273	14,316	15,035	16,034
Student to Staff Ratios						
Student to Central Administration	615.9	1,239.4	1,121.6	761.5	1,366.8	1,085.9
Student to Campus Administration	306.6	252.8	258.2	272.7	253.5	267.8
Student to Teacher	15.1	15.3	13.8	14.8	13.5	14.4
Student to Education Aides	73.0	69.9	54.2	49.8	51.2	62.1
Student to Professional Support	69.0	87.5	76.0	84.4	79.6	78.0
Student to Auxiliary	22.2	26.2	33.7	22.9	38.3	30.1
Student to Total Staff	6.9	7.5	7.2	6.7	7.3	7.2
Percentage of Total Staff						
Central Administration	1.1%	0.6%	0.6%	0.9%	0.5%	0.7%
Campus Administration	2.3%	3.0%	2.8%	2.5%	2.9%	2.7%
Teachers	45.9%	48.7%	52.3%	45.7%	54.1%	50.3%
Education Aides	9.5%	10.7%	13.3%	13.5%	14.3%	12.0%
Professional Support	10.0%	8.5%	9.5%	8.0%	9.2%	9.3%
Auxiliary	31.2%	28.5%	21.4%	29.5%	19.1%	25.1%
Total Staff	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

SOURCE: Texas Education Agency, PEIMS, 2003–04.

**EXHIBIT A-38
AUXILIARY STAFF BY FUNCTION
VISD VERSUS PEER DISTRICTS
2003-04**

FUNCTION	BRYAN	LAMAR CISD	TYLER	VICTORIA	WICHITA FALLS	PEER AVERAGE
11 Instruction	2.0	11.7	10.6	28.6	11.7	9.0
12 Instruction Resources	12.0	4.5	4.0	7.0	19.7	10.1
13 Curriculum & Staff Development	0.0	5.9	2.0	1.5	0.0	2.0
21 Instructional Leadership	21.2	9.3	20.0	15.8	9.8	15.1
23 School Leadership	76.6	75.3	68.0	63.6	55.9	69.0
31 Guidance Counseling	2.0	10.7	6.5	20.8	12.0	7.8
32 Social Work Services	11.1	2.0	1.0	10.5	2.4	4.1
33 Health Services	1.0	0.0	0.0	0.0	22.9	6.0
34 Student (Pupil) Transportation	120.9	125.1	58.7	78.9	3.0	76.9
35 Food Services	163.2	128.8	117.2	137.4	166.0	143.8
36 Co-/Extracurricular Activities	1.0	3.0	2.0	3.0	1.4	1.9
41 General Administration	19.0	26.7	20.1	25.7	19.0	21.2
51 Plan Maintenance/Operations	189.2	252.0	172.7	208.4	66.0	170.0
52 Security & Monitoring Services	4.0	12.0	15.0	9.7	0.0	7.8
53 Data Processing Services	4.0	3.3	8.0	13.8	2.5	4.5
61 Community Services	7.7	5.9	6.6	0.1	0.0	5.1
99 Other Intergovernmental Charge	0.0	0.0	0.0	1.0	0.0	0.0
Total	634.9	676.2	512.4	625.8	392.3	554.3
Enrollment	14,104	17,724	17,273	14,316	15,035	16,034

SOURCE: Texas Education Agency, PEIMS, 2003-04.

**EXHIBIT A-39
AVERAGE TEACHER EXPERIENCE
VISD VERSUS PEER DISTRICTS
2003-04**

VICTORIA	TYLER	WICHITA FALLS	BRYAN	LAMARCISD	PEER AVERAGE
13.4	12.2	12.1	10.1	11.0	11.4

SOURCE: Texas Education Agency, PEIMS, 2003-04.

**EXHIBIT A-40
TEACHERS BY DEGREE
VISD VERSUS PEER DISTRICTS
2003-04**

DEGREE TYPE	BRYAN	LAMAR CISD	TYLER	VICTORIA	WICHITA FALLS	PEER AVERAGE
Bachelor's	752.7	915.9	900.0	765.5	893.5	865.5
Doctorate	3.0	4.0	4.0	3.0	0.0	3.7
Master's	177.5	227.4	342.2	189.3	209.3	239.1
No Degree	2.0	8.0	6.9	11.9	10.1	6.8
Total Teachers	935.2	1,155.3	1,253.1	969.7	1,112.9	1,115.1
Enrollment	14,104	17,724	17,273	14,316	15,035	16,034

SOURCE: Texas Education Agency, PEIMS, 2003-04.

ORGANIZATION AND MANAGEMENT

The director of Personnel, a position that is currently vacant, manages the daily operations of the Personnel Department. The director, as well as one of the two departmental secretaries, retired in August 2004.

The director of Personnel reports directly to the superintendent. There are five full-time paraprofessionals in the department that support the

director. One part-time clerk works a short morning shift placing substitute teachers.

The director of Personnel oversees the hiring and staffing of the district's professional and paraprofessional employees. This includes posting positions, recruiting for the positions, coordinating the selection and interviewing applicants, processing new hires, ensuring that certification requirements are met, and managing the employee evaluation process.

The secretary for Professional Services is responsible for ensuring that all teachers have the proper certification to meet the “highly qualified” standard as set out in NCLB. This position notifies teachers of any gaps they might need to fill to meet this standard, provides them with continuing education options, and monitors their progress. Additionally, this position is responsible for processing all administrator and teacher applications and maintaining their service records.

The secretary for Paraprofessional Services performs these same functions for the paraprofessional staff, including applicant tracking, maintaining the paraprofessional personnel files, updating service records, posting job vacancies, testing applicants, and tracking Family Medical Leave Act (FMLA) compliance for the district.

The Personnel data analyst is responsible for calculating salaries for professional employees. This position works closely with payroll to ensure accuracy. The personnel files for all professionals are maintained and locked in her office. When a professional employee is hired, this position is responsible for sending out their contracts. Once a year, the Personnel data clerk prints out all of the district’s service records, and they are reviewed for accuracy.

The Personnel Department also processes requests for substitute teachers. Once a request has been made for a substitute, the substitute coordinator notifies a substitute from the approved list and makes the assignment. The district places approximately 55 substitutes per day.

The Personnel clerk is responsible for greeting applicants, processing departmental mail, and clerical support. All of the department’s paraprofessionals, including the secretaries, substitute coordinator, data analyst, and clerk, have been cross-trained so that every position is covered at all times.

Exhibit A–41 presents the department’s current organization structure.

RECRUITMENT, HIRING, AND STAFFING

As student enrollment across the state increases and more teachers retire, Texas faces a critical teacher shortage. More than 1,040 Texas school districts are competing for teachers from an ever-shrinking pool.

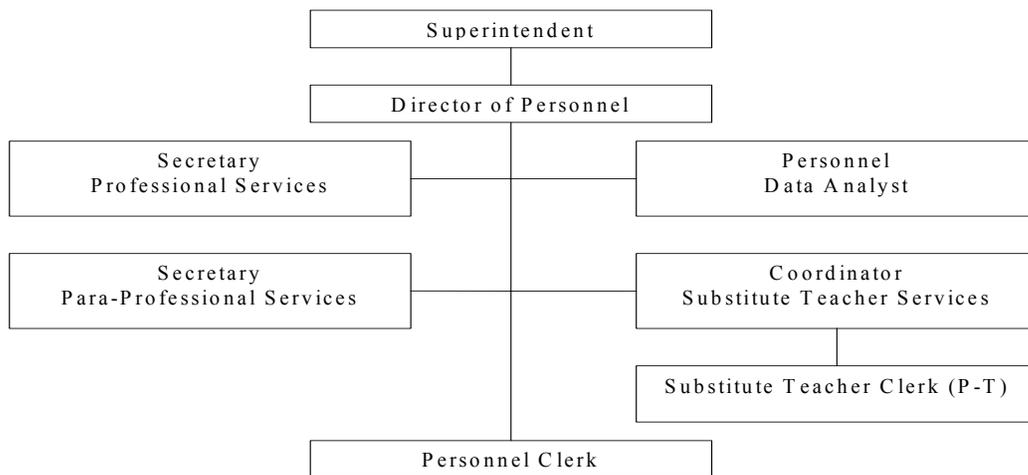
Recruitment is becoming increasingly competitive and the supply of teachers is declining, both of which make retaining staff more important than ever.

Exhibit A–42 presents five major reasons why employees leave and the five most effective initiatives for retaining employees, according to the Society for Human Resources Management.

When school districts are unable to fill teacher vacancies, substitute teachers are often used. Finding qualified substitute teachers is frequently a problem.

An effective recruitment and selection process identifies candidates best qualified to fill available positions. A thorough review must include a candidates’ experience, education, potential, and the quality of his or her past performance. The director of Personnel assumes the lion’s share of the district’s teacher recruiting efforts. The district attends Career Fairs and makes recruiting trips to universities and

EXHIBIT A-41
VISD PERSONNEL DEPARTMENT ORGANIZATION CHART
2003-04



SOURCE: VISD Personnel Department, April 2004.

**EXHIBIT A-42
THREATS TO RETENTION AND INITIATIVES FOR RETAINING EMPLOYEES**

THREATS TO EMPLOYEE RETENTION (in order of percentage offered and general effectiveness)	MOST EFFECTIVE INITIATIVES FOR RETAINING EMPLOYEES (in order of importance to employees)
Higher salaries of competitors Dissatisfaction with career development Not being appreciated Job burnout Conflicts with supervisors or co-workers	Health care New hire orientation Open communications policy Salary increases Emphasis on career development

SOURCE: Society for Human Resource Management, Retention Practice Mini-Survey, 1997.

colleges across the state. In the fall of 2003-04, the director of Personnel recruited teachers at the University of Texas – Pan American, University of Texas – San Antonio, Texas A&M University – Corpus Christi, Texas A&M University – Kingsville, Texas, and Texas State University. In the spring, recruiting trips were taken to Sul Ross University, Our Lady of the Lake University, St. Mary’s University, Texas A&M University – Laredo, Texas A&M University – Prairie View, Texas, as well as to the same universities visited in the fall.

The hiring process at VISD involves several individuals. Decisions on who to hire are the responsibility of principals and supervisors. When a principal or administrator has a teaching, professional support, or paraprofessional vacancy, he or she goes to the Personnel Department and reviews the applications that have been received either in response to a posting or that have been kept on file. The principal or the supervisor then determines which applicants to interview and either the Personnel Department or the campus or department secretary sets up the appointments. An interview committee conducts the interviews and make the hiring recommendation. Contracted employees are brought to the board for approval. The hiring process is similar for classified personnel, although, all applications are kept in the respective departments rather than the Personnel Department. The Personnel Department, in cooperation with the Management Information Systems (MIS) Department, has developed an online application process. An applicant can now apply for a position at the district online and attach a resume to their submission.

The district is focusing its recruiting efforts on colleges and universities where it has seen success, and is working to increase the number of minority teachers it recruits. Of the last 276 graduate teachers hired by the district over the past three years, 68.6 percent have come from colleges and universities visited by VISD. **Exhibit A-43** lists the universities where recently hired teachers graduated, ranging from the highest number to the lowest.

The district has begun to track its success and modify its recruiting visits to focus on the colleges

and universities where it has been successful. After each recruiting trip, the results are evaluated based on the number of applications received, and a decision is made as to whether the district will go back to that campus during the next term. However, the district continues its recruiting efforts at Sul Ross and the University of Texas – Pan American because these institutions have a high number of Hispanic students, an area the district recognizes it needs to improve.

VISD has a disproportionate number of minority teachers given the large number of minority students. This is particularly true of Hispanic teachers, who represent only 16.4 percent of the teaching staff, or roughly one-third the percentage of Hispanic students, who make up 50.8 percent of the student population. The director of Personnel now includes minority professionals on recruiting trips to those colleges and universities that have a high number of minority graduates. The district is making strides to increase diversity within its teaching and administrative staff and has seen improvement. However, there is still a wide disparity between the numbers of minority teachers and the number of minority students in the district. **Exhibit A-44** illustrates the disparity between the ethnicity of the district’s teaching staff and student population.

The district has made progress in diversifying its teaching staff, as shown in **Exhibit A-45**. The percentage of Hispanic teachers has increased 6.6 percent since 1999–2000. Between 2002–03 and 2003–04, the district increased the percentage of Hispanic teachers by 5.0 percent.

VISD has the highest number of Hispanic teachers in its peer group, far above the peer average. The number of VISD Anglo teachers is lower than peers. **Exhibit A-46** compares teacher ethnicity in VISD to its peer districts. Student ethnicity within the peer group is examined in **Exhibit A-47**.

EXHIBIT A-43**VISD UNIVERSITY RECRUITMENT STATISTICS****2000-01 THROUGH SEPTEMBER 12, 2003 RECRUITING SEASON**

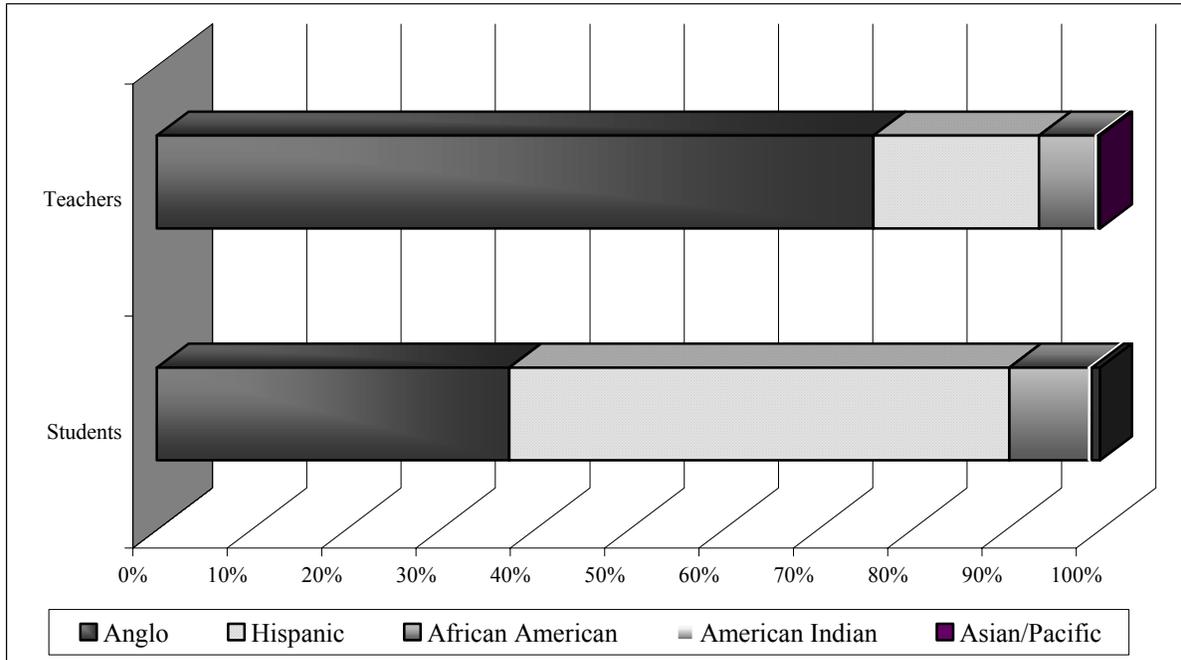
UNIVERSITY	NUMBER OF NEW PROFESSIONALS HIRED	PERCENT OF TOTAL HIRED	CAMPUS VISITED BY VISD
University of Houston – Victoria	90	32.6%	Y
Southwest Texas State University	24	8.7%	Y
Texas A&M University – College Station	18	6.5%	Y
Texas A&M University – Kingsville	12	4.3%	Y
Sam Houston State University	9	3.3%	Y
University of Texas – Austin	8	2.9%	Y
Texas Tech University	7	2.5%	Y
University of Houston – Houston	7	2.5%	
University of Texas – San Antonio	6	2.2%	Y
Stephen F. Austin University	5	1.8%	Y
Texas A&M University – Corpus Christi	4	1.4%	
University of North Texas	4	1.4%	
Angelo State University	3	1.1%	Y
Texas A&M University – Commerce	2	0.7%	
Texas Lutheran University	3	1.1%	
Texas A&M University – Prairie View	3	1.1%	Y
Tarleton State University	3	1.1%	
Texas Women’s University	3	1.1%	
University of Houston – Clear Lake	2	0.7%	
Kansas State University	2	0.7%	
Austin College	2	0.7%	
North Texas State University	2	0.7%	
Texas A&M University – East Texas	2	0.7%	
Southern Baptist University	2	0.7%	
Howard Payne University	2	0.7%	
Adams State University	1	0.4%	
Arizona State University	1	0.4%	
Baylor University	1	0.4%	
Bishop College	1	0.4%	
Central Michigan University	1	0.4%	
Colorado University	1	0.4%	
Concordia University	1	0.4%	
University of Del Valle	1	0.4%	
Elon College	1	0.4%	
Cameron University	1	0.4%	
Dallas Baptist College	1	0.4%	
East Central State University	1	0.4%	
Gonzaga University – Washington	1	0.4%	
Hardin-Simmons University	1	0.4%	Y
Houston Baptist University	1	0.4%	
Illinois University	1	0.4%	
University of Kansas	1	0.4%	
Louisiana State University	1	0.4%	
Lamar University	1	0.4%	
Lubbock Christian University	1	0.4%	
Lander University	1	0.4%	
Miami University	1	0.4%	
Mary Hardin Baylor University	1	0.4%	Y
Massachusetts University	1	0.4%	
Universidad Autonoma de Mexico	1	0.4%	
New Mexico State University	1	0.4%	
University of North Carolina	1	0.4%	
Northern Colorado University	1	0.4%	
Ohio State University	1	0.4%	
Ozarks University	1	0.4%	
University of Texas - Pan American	1	0.4%	Y
Philippines Normal University	1	0.4%	
Roanoke College	1	0.4%	
University of South Dakota	1	0.4%	
Southwestern University	1	0.4%	

EXHIBIT A-43 (CONTINUED)
VISD UNIVERSITY RECRUITMENT STATISTICS
2000-01 THROUGH SEPTEMBER 12, 2003 RECRUITING SEASON

UNIVERSITY	NUMBER OF NEW PROFESSIONALS HIRED	PERCENT OF TOTAL HIRED	CAMPUS VISITED BY VISD
Southwest Assembly of God	1	0.4%	
Stephens College	1	0.4%	
St. Ambrose University – Iowa	1	0.4%	
St. Mary’s University – Minnesota	1	0.4%	
University of Santo Tomas	1	0.4%	
Sul Ross University	1	0.4%	Y
Syracuse Hobartny University	1	0.4%	
University of Tennessee	1	0.4%	
Troy State University	1	0.4%	
U.S. Military Academy	1	0.4%	
Utah University	1	0.4%	
University of Dallas	1	0.4%	
University of Texas at El Paso	1	0.4%	
University of Texas at Permian Basin	1	0.4%	
University of Texas at Tyler	1	0.4%	
Western Kentucky University	1	0.4%	
West Point Academy	1	0.4%	
West Texas A&M University	1	0.4%	
Total	278		

SOURCE: VISD Personnel Department, April 2004.

EXHIBIT A-44
COMPARISON OF TEACHER/STUDENT ETHNICITY
2003-04



Source: Texas Education Agency, PEIMS, 2003-04

STAFF DEVELOPMENT

Section 21.451 of the Texas Education Code (TEC) outlines the requirements for staff development in public schools. At a minimum, the TEC requires training in technology, conflict resolution, and discipline management. Training must be

predominantly campus-based, under Section 11.253, and developed and approved by a campus-level committee. It may include activities that enable the campus staff to plan together to enhance existing skills, share effective strategies, reflect on curricular and instructional issues, analyze student achievement,

EXHIBIT A-45
COMPARISON OF VISD TEACHER ETHNICITY
1999-2000 THROUGH 2003-04

ETHNICITY	1999-2000	2000-01	2001-02	2002-03	2003-04	PERCENT CHANGE
Anglo	786.6	803.9	771.8	755.4	736.6	(6.4%)
Hispanic	159.7	159.6	165.2	162.1	170.2	6.6%
African American	70.4	73.0	67.2	56.6	58.4	(17.0%)
American Indian	0.0	0.0	0.0	0.0	2.5	N/A
Asian/Pacific	2.5	2.5	2.0	2.0	2.0	(20.0%)

SOURCE: Texas Education Agency, PEIMS, for the years indicated.

EXHIBIT A-46
TEACHER ETHNICITY
VISD VERSUS PEER DISTRICTS
2003-04

ETHNICITY	BRYAN	LAMAR CISD	TYLER	VICTORIA	WICHITA FALLS	PEER AVERAGE
Anglo	795.8	939.0	930.5	736.6	1,015.8	920.3
Hispanic	87.0	124.8	97.7	170.2	39.5	87.3
African American	51.4	78.6	220.0	58.4	46.5	99.1
American Indian	0.0	0.0	0.0	2.5	5.0	5.0
Asian/Pacific	1.0	13.0	5.0	2.0	6.0	6.3
Total	935.2	1,155.4	1,253.1	969.7	1,112.9	1,114.2

SOURCE: Texas Education Agency, PEIMS, 2003-04.

EXHIBIT A-47
STUDENT ETHNICITY
VISD VERSUS PEER DISTRICTS
2003-04

ETHNICITY	BRYAN	LAMAR CISD	TYLER	VICTORIA	WICHITA FALLS	PEER AVERAGE
Anglo	5,105	6,324	5,704	5,350	8,529	6,415.5
Hispanic	5,374	8,399	5,454	7,586	3,357	5,646.0
African American	3,526	2,513	5,871	1,208	2,635	3,636.3
American Indian	9	22	36	48	131	49.5
Asian/Pacific	90	466	208	124	383	286.8
Total	14,104	17,724	17,273	14,316	15,035	16,034.0

SOURCE: Texas Education Agency, PEIMS, 2003-04.

reflect on ways of increasing student achievement, review relevant research, practice new methods, identify students' strengths and needs, develop meaningful programs for students, implement site-based decision-making, and conduct action research. Schools may conduct activities using study teams, individual research, peer coaching, workshops, seminars, conferences, or other reasonable methods that have the potential to improve student achievement. A school district may also use district-wide staff development that is developed and approved through the district-level decision process approved through the district-level decision process under Section 11.251.

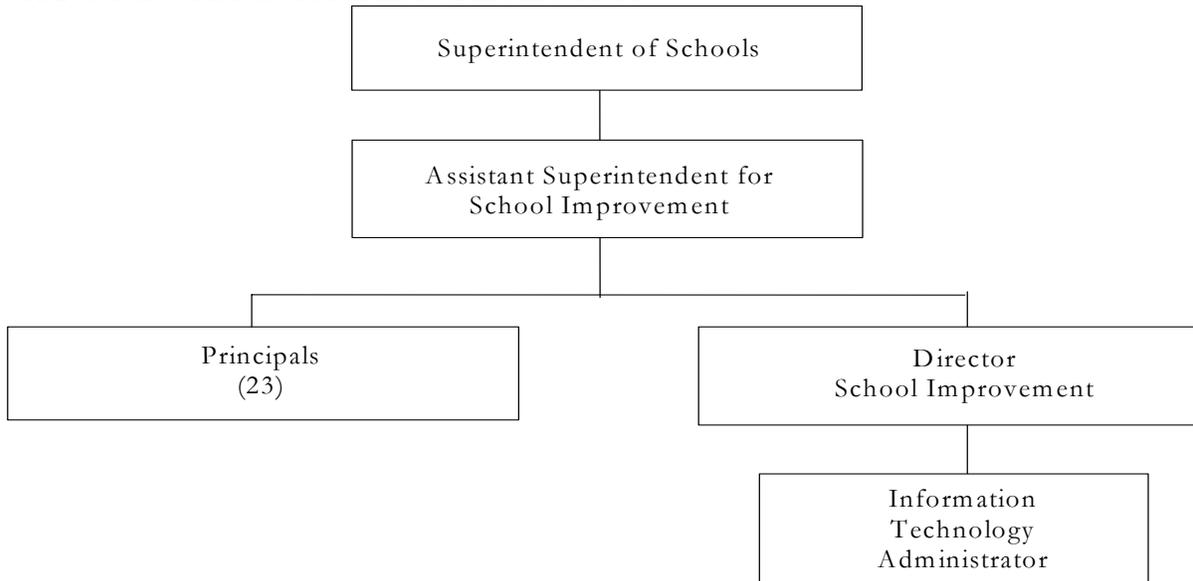
Professional development in VISD is handled in the School Improvement Department. **Exhibit A-48** shows the organizational structure for the function. As this exhibit shows, the director of School Improvement, who reports to the assistant superintendent for School Improvement, is in charge of professional development.

The mission of the VISD's professional development is to ensure student success and improve student academic achievement by supporting current and future campus' needs, and by elevating the skill and performance levels of VISD staff. The goals of the department include the following:

- Enhance the delivery models and practices used to educate our students, including those with disabilities.
- Enhance technology integration and use throughout the district.
- Improve communications and interactions throughout the district by providing enhanced conflict resolution and discipline strategy training.

The VISD staff development plan has evolved out of a district philosophy that embraces the goal of improving student learning through the alignment of

**EXHIBIT A-48
VISD'S SCHOOL IMPROVEMENT DEPARTMENT**



SOURCE: VISD Organizational chart, May 2004.

district and campus goals. The plan is designed around the following:

- A context of learning communities, leadership, and resources;
- A process that uses disaggregated student data to evaluate learning in a research context; and
- Content that holds high expectations of students, deepens educator knowledge, and involves families wherever appropriate.

Both district and campus plans include strategies for needs assessment, review implementation alternatives, create ways to share learning, provide for a review to determine appropriateness, prioritize training, and evaluate results. The overall plan also includes a checklist of steps for designing, implementing, evaluating professional development, and sharing new learning with others. It further specifies that organizers should do the following:

- Include participants in the process.
- Make a plan that explains how the activity supports the school/district long-term plan; develop a needs assessment process; describe goals, content, process, and activities; identify required resources; and design an evaluation process.
- Share the plan with those who will use it.

The staff development plan also includes a timeline, the district improvement plan, district policies that address the program, and a list of helpful resources.

A professional development committee provides input into planning.

VISD staff development is largely decentralized to site-based management teams on campus. Campuses determine much of their continuing training based upon needs assessment. In fact, six out of eight scheduled staff development days are campus-based. Staff participates in several ways. For example, Region 3 provides administrators with School Administrators Skills Assessment (SASA) training, which the State Board for Educator Certification (SBEC) requires. Administrators also receive “nuts and bolts” training each fall. Elementary school teachers receive three hours of training each month; third-grade teachers come together for staff development four times per year; and math teachers for grades 6 through 12 do so twice a year. The district also orients substitute teachers twice a year in VISD policy/procedures and teaching strategies and supplies them with a handbook of information on district contacts, substitute duties, ethics, and classroom management, among other topics.

COMPENSATION

Competitive salaries and employee benefits, such as retirement and health benefits, attract and retain highly qualified and competent professional, faculty, and support staff. Employees should be treated equitably and understand how their salary is determined. An effective compensation plan, including benefits, is critical to attracting and retaining quality employees.

The management of staffing, salaries, and benefits has a profound effect on the amount of money available for other programs; the more efficiently payroll costs are controlled the more flexibility a district has in distributing funds to necessary programs. All school districts have similar goals for their compensation system: to attract, retain, and motivate employees in sufficient types and numbers to achieve the goals of the district. A sound compensation system should facilitate the following objectives:

- provide external competitiveness and equity;
- provide internal equity;
- be understandable to and accepted by employees;
- be affordable; and
- provide ease of administration.

Payroll costs account for the single largest expenditure of VISD's budget. During interviews and focus groups, one of the key areas of concern was related to salary issues, with the prevailing message being that VISD does not pay its employees adequately. The district is in the process of hiring an outside consultant to conduct a formal salary study. The study is expected to take approximately three months. The cost of the study presented to the board by two vendors ranges from \$28,000 to \$65,000. **Exhibits A-49, A-50, and A-51** present the current pay scales in place for classified staff, paraprofessionals, and administrators, respectively.

PERFORMANCE MANAGEMENT

Performance evaluations provide a mechanism for recognizing good performance, identifying areas needing improvement, and providing documentation to justify termination decisions. Performance evaluations provide feedback and counseling, assist in allocating rewards and opportunities, and help plan for professional development needs. They also communicate expectations and foster commitment and mutual understanding.

Frequent and balanced performance feedback that is free of potential bias serves as one of the most effective leadership tools for improving productivity and increasing faculty and non-faculty employee satisfaction. According to the Society for Human Resource Management, emerging data shows that feedback provides a key driver for continuous learning, creativity, and, ultimately, customer satisfaction.

Exhibit A-52 illustrates a best practice for implementing performance appraisals.

The goal of feedback is to get the employee to either maintain or enhance positive performance or to change or correct negative performance. Supervisors must outline the tasks to be accomplished and expected standards of performance to achieve this goal. They must identify specific actions necessary to achieve performance standards and also establish a time frame. Most importantly, they must state what will happen if the specified action does not occur.

**EXHIBIT A-49
VISD CLASSIFIED PAY SCALE
HOURLY RATE
2003-04**

PAY GRADE	MINIMUM	MIDPOINT	MAXIMUM
1	5.52	6.91	8.28
2	5.99	7.48	8.97
3	7.26	9.09	10.91
4	9.12	11.41	13.70
5	10.22	12.76	15.33
6	11.45	14.31	17.18
7	12.83	16.02	19.24

SOURCE: VISD, Personnel Department, April 2004.

**EXHIBIT A-50
VISD PARAPROFESSIONAL PAY SCALE
DAILY RATE
2003-04**

PAY GRADE	MINIMUM	MIDPOINT	MAXIMUM
1	50.95	63.68	76.42
2	57.06	71.32	85.59
3	63.91	79.88	95.86
4	71.58	89.47	107.38
5	97.35	121.68	146.01

SOURCE: VISD, Personnel Department, April 2004.

**EXHIBIT A-51
VISD ADMINISTRATIVE PAY SCALE
DAILY RATE
2003-04**

PAY GRADE	MINIMUM	MIDPOINT	MAXIMUM
1	115.29	144.12	172.95
2	154.71	193.39	232.07
3	167.10	208.87	250.64
4	180.46	225.58	270.69
5	194.89	243.62	292.34
6	210.48	263.12	315.73
7	227.34	284.17	341.00
8	245.51	306.91	368.28

SOURCE: VISD, Personnel Department, April 2004.

**EXHIBIT A-52
BEST PRACTICE PERFORMANCE APPRAISAL PROCESS**

STEP	DESCRIPTION
Step 1	HR Department designs the performance appraisal system with the aid, input, direction and support of all levels of management and makes the forms and directions, available online.
Step 2	HR Department trains appraisers in how to use the instrument to evaluate their staff and how to communicate the appraisal to employees.
Step 3	Supervisors/appraisers evaluate staff based on the duties listed in the job description and the criteria/standards communicated to the staff at the beginning of the current appraisal period. Simultaneously, employees complete the same document, evaluating themselves with the same criteria used by their supervisor. This helps to reduce conflict because the employee has given thought to the same appraisal criteria as their manager.
Step 4	Supervisors/appraisers consult with their manager on all staff appraisals performed.
Step 5	Appraisers and employees meet to discuss and develop a consensus of the performance for the past appraisal period and establish goals and training objectives for the next appraisal period. The results of the appraisal interview will be written (copies to be kept by appraiser and employee).
Step 6	All documents will be forwarded to human resources to be filed and retained.

SOURCE: Society for Human Resources Management, September 2002.

CHAPTER 5 FACILITIES CONSTRUCTION, USE, AND MANAGEMENT

VISD covers 605 square miles and is located in the transportation center of what is referred to as the “Golden Crescent” of Texas. It is geographically centered between the major cities of Houston, Austin, San Antonio and Corpus Christi.

Enrollment in the district totaled 14,316 students in 2003-04. Enrollment decreased from 1999–2000

through 2003–04 by 2.3 percent. VISD’s facilities are located on 478 acres with a total of 25 schools, which includes 15 elementary schools, three middle schools, one high school with two campuses, and five special purpose schools, totaling 1,800,000 gross square feet (GSF) of permanent space and 52,000 GSF of portable space. In addition, the district has seven support facilities totaling 165,000 GSF. Total VISD facilities include approximately 2.0 million gross square feet of space and are described in **Exhibit A-53**.

EXHIBIT A-53 LIST OF VISD FACILITIES 2003-04

SCHOOL	DATE OPENED	SITE ACREAGE	PERMANENT AREA (GSF)	PORTABLE AREA (GSF)	TOTAL AREA (GSF)	2003-04 ENROLLMENT	GSF PER STUDENT
Elementary Schools							
Aloe Elementary	1950	21.46	59,563	0	59,563	553	108
Chandler Elementary	2001	11.18	72,681	0	72,681	591	123
DeLeon Elementary	1980	10.00	58,237	1,536	59,773	606	99
Dudley Elementary	1963	10.00	63,893	1,536	65,429	521	126
FW Gross Elementary	1959	6.99	48,514	0	48,514	499	97
Guadalupe Elementary	1956	8.00	21,537	768	22,305	123	181
Hopkins Elementary	1953	27.07	62,847	1,536	64,383	458	141
Juan Linn Elementary	1950	3.89	53,045	3,072	56,117	457	123
Mission Valley Elementary	1937	10.63	23,311	3,840	27,151	209	130
O'Connor Elementary	1956	11.61	60,945	5,376	66,321	583	114
Rowland Elementary	1967	10.00	65,724	0	65,724	497	132
Shields Elementary	1953	10.99	65,750	1,536	67,286	646	104
Smith Elementary	1958	10.00	61,220	0	61,220	519	118
Vickers Elementary	1966	10.00	62,272	0	62,272	564	110
William Wood Elementary	1951	10.00	19,346	3,072	22,418	120	187
Total Elementary		171.82	798,885	22,272	821,157	6,946	118
Middle Schools							
Crain Middle School	1954	20.06	118,834	8,448	127,282	1,011	126
Howell Middle School	1970	20.10	135,904	0	135,904	1,066	127
Patti Welder Middle School	1962	38.63*	101,288	2,304	103,592	1,056	98
Total Middle Schools		78.78	356,026	10,752	366,778	3,133	117
High Schools							
MHS – Stroman Campus	1967	40.24	254,955	4,608	259,563	2,267	114
MHS – Senior Campus	1958	125.82	286,560	4,608	291,168	1,614	180
Total High Schools		166.06	541,515	9,216	550,731	3,881	142
Alternative Education							
Career Development School	N/A	****	75,600	0	75,600	N/A	N/A
Coleta Creek	2001	**	5,804	3,072	8,876	50	178
Juvenile Center Academic Achiev.	2000	***	N/A	N/A	N/A	16	N/A
Juvenile Detention Center	2000	***	1,536	-	1,536	21	73
Mitchell Guidance Center	1990	1.00	22,618	1,536	24,154	102	237
Profit Academic Center	1990	****	15,050	4,608	19,658	167	118
Total Alternative Ed		1.00	120,608	9,216	129,824	356	365
Other Facilities							
Family Connection	N/A	0.68	4,860	0	4,860	N/A	N/A
Hope School (Part of Transportation/Maintenance)	N/A	*	3,504	1,536	5,040	N/A	N/A
Maintenance	N/A	*	26,000	0	26,000	N/A	N/A
Memorial Stadium	N/A	47.06	26,000	0	26,000	N/A	N/A
Transportation	N/A	*	14,935	0	14,935	N/A	N/A
Central Warehouse	N/A	****	35,285	0	35,285	N/A	N/A
Food Services	N/A	****	14,528	0	14,528	N/A	N/A
Administration	N/A	12.94	38,200	0	38,200	N/A	N/A
Total Other Facilities		60.68	163,312	1,536	164,848	N/A	N/A
Total		478.35	1,980,346	52,992	2,033,338	14,316	142

SOURCE: VISD Facilities, Student Enrollment from 2003–04 PEIMS data.

* Total Site Area noted as Patti Welder Middle School includes Hope School, the Plant Maintenance Department and Transportation Department. ** Property is not owned by VISD; Property of Devereaux, Inc. *** Property of Victoria County. **** Part of Administration Building at 102 Profit Drive.

In 1997, the Victoria community voted to approve the passage of a \$31 million bond issue, designated as the 1997–1998 VISD Bond Program. The bond referendum language was general and did not list specific projects. However, in December of 1997, VISD applied for an Instructional Facilities Allotment (IFA) from TEA, which listed the bond projects shown in **Exhibit A–54**.

The district consolidated its two high schools, Victoria and Stroman, in the 2000-01 school year. The district renamed the consolidated school Memorial High School (MHS). Stroman High was renamed MHS - Stroman Campus, and Victoria High was renamed MHS - Senior Campus. As a result of the consolidation, the Stroman Campus serves ninth and tenth graders and the Senior Campus serves eleventh and twelfth graders. The consolidation has adversely impacted the Stroman Campus by overcrowding that facility. The review team received a significant number of comments from district employees, students, parents, and the community voicing their concern about the overcrowding and safety issues at the Stroman Campus.

In June 2003, Hurricane Claudette hit land on the Texas coast, causing damage to many cities and

towns in the Matagorda Bay area. The city of Victoria was one of those cities. According to the July 17, 2003 board minutes, every campus at VISD suffered damage from the storm. The Stroman campus suffered the most extensive damage, having lost most of the roof on the four-story building. Other campuses also experienced roof damage and numerous broken tree limb-related damages. The district filed for and received payment for damage claims from their insurance carrier and the Federal Emergency Management Agency (FEMA) to recover part of the cost of the storm damage.

FACILITIES MANAGEMENT AND ORGANIZATION

A comprehensive facilities operation includes facilities planning, design, construction management; maintenance management; custodial services; and energy management functions. A school district’s facilities department, including maintenance, custodial, and energy management, should effectively coordinate all physical resources in the district. The objective of this program is to provide a safe and clean environment for students and integrate facilities planning with other aspects of school planning. Moreover, facilities personnel should be

**EXHIBIT A–54
VISD BOND PROGRAM
1997–98**

SCHOOL / FACILITY	TOTAL
Aloe Elementary	\$939,009
Career Development School	166,969
Chandler Elementary	0
Coleta Creek School	0
Crain Middle School	2,791,576
DeLeon Elementary	372,944
Dudley Elementary	1,055,683
F.W. Gross Elementary	735,150
Guadalupe Elementary	666,177
Hopkins Elementary	1,467,003
Howell Middle School	1,963,608
Juan Linn Elementary	1,239,972
Juvenile Detention Center	0
Memorial HS – Senior Campus	4,647,002
Memorial HS - Stroman Campus	4,444,525
Mission Valley Elementary	281,634
Mitchell Guidance Center	183,079
O’Connor Elementary	880,517
Patti Welder Middle School	1,708,735
Patti Welder Stadium	95,100
Profit Academic Center	507,218
Rowland Elementary	1,427,616
Shields Elementary	1,145,889
Smith Elementary	733,369
Stanly Elementary	1,336,137
Transportation Office	65,000
Vickers Elementary	1,642,670
William Wood Elementary	503,418
Total	\$31,000,000

SOURCE: VISD Instructional Facilities Allotment Application dated 12/12/97.

involved in planning, design, and construction activities and be knowledgeable about operations and maintenance activities. Finally, facilities departments should operate under clearly defined policies and procedures that provide the flexibility to accommodate changing district budget and facility requirements.

The mission of an effective facilities planning, design, and construction management function is to plan for and provide facilities that meet the needs of students at the lowest possible cost. The specific goals of a facilities planning, design, and construction management function are as follows:

- Establish a policy and framework for long-range facilities planning;
- Provide valid enrollment projections on which to base estimates of future needs for sites and facilities;
- Select and acquire proper school sites and time facility acquisition to coincide with but not precede actual need;
- Determine the student capacity, educational adequacy, and safety and security of existing facilities and evaluate alternatives to new construction;
- Develop educational program specifications from which the architect can design a functional facility that matches the needs of the curriculum while enhancing and reinforcing student education;
- Secure architectural services to assist in planning and constructing facilities;
- Develop a capital planning budget that balances facility needs with expenditures necessary to meet those needs and provides cost effective financing options;
- Translate the approved architectural plans into a high-quality facility within budget and time schedules; and
- Establish and carry out an orientation program to acquaint new facility users with the design and functional layout of the building.

The major ongoing activity in facilities management is referred to as maintenance management. The goals of an effective maintenance management function are as follows:

- Extend the life of facilities and maximize their potential use;
- Increase facilities staff productivity;

- Select the most cost-effective methods for operations;
- Improve and maintain the appearance of facilities;
- Implement programs to conserve energy; and
- Ensure the safety and security of buildings and users.

Custodial services support the total school program to ensure that buildings are clean, sanitary, and comfortable for use by students and staff. The goal of energy management is to keep operating costs down while providing a safe, comfortable environment for learning.

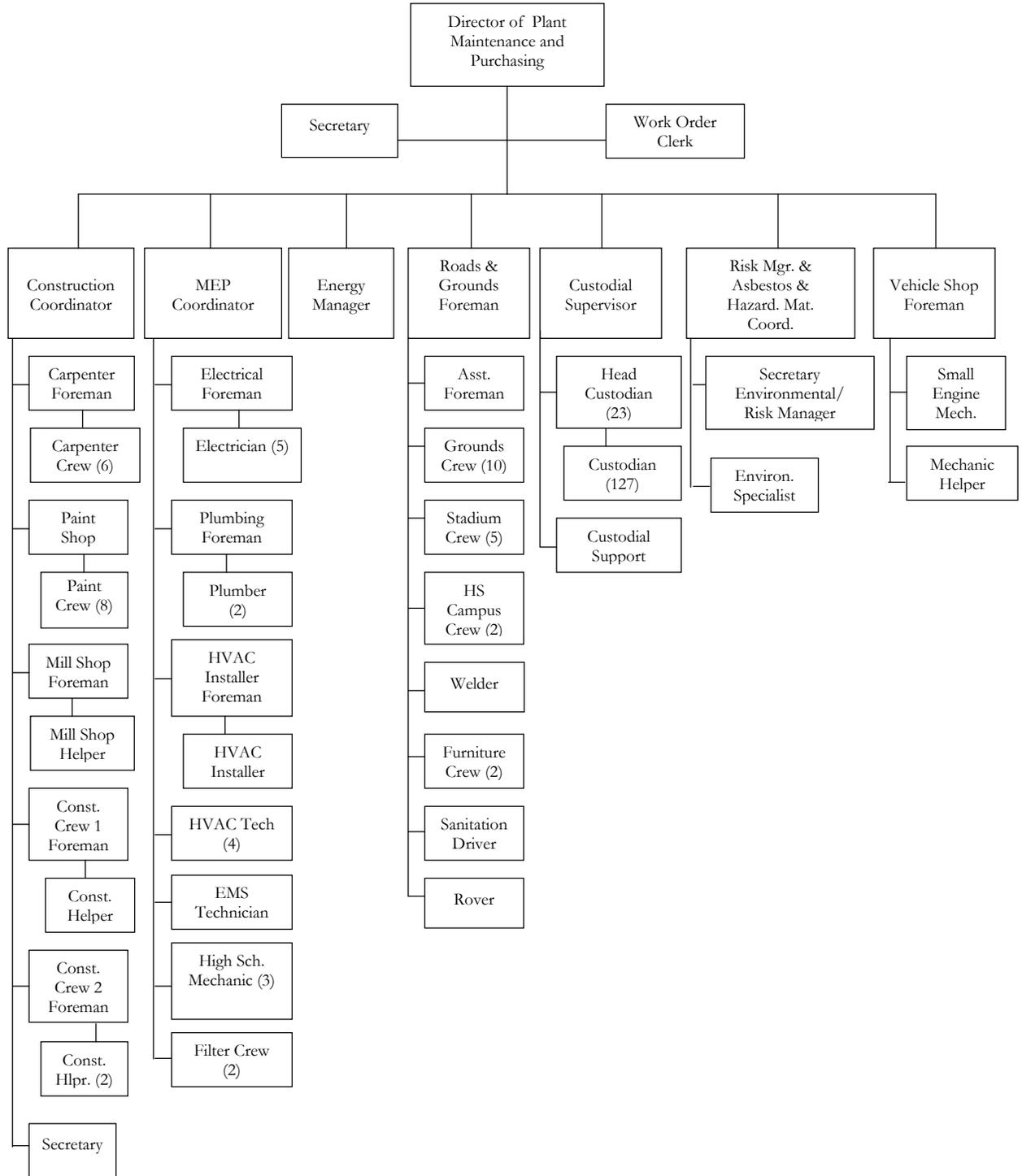
VISD's facilities management functional responsibilities are assigned to the director of Plant Maintenance and Purchasing. The director of Plant Maintenance and Purchasing reports to the superintendent. The director supervises the Construction Coordinator; Mechanical, Electrical, and Plumbing (MEP) Coordinator; Road and Grounds Foreman; Custodial Supervisor; Risk Manager and Asbestos and Hazardous Materials Coordinator; Energy Manager; and Vehicle Shop Foreman. The Plant Maintenance Department employs 231 individuals; 81 maintenance and 150 custodial. **Exhibit A-55** displays the organizational chart for the Plant Maintenance Department.

CLASSROOM AND OVERALL BUILDING USAGE

Every district should strive to have the right number and types of facilities to handle current programs and current student enrollment. Too many facilities can be costly to maintain, and too few facilities can result in overcrowding and unsafe conditions for students and staff.

Enrollment at the VISD elementary schools range from 49.6 to 75.4 percent of total capacity, with only three schools operating above 70.0 percent capacity. The total capacity rate of 49.6 percent at William Wood Elementary is the lowest, followed by Juan Linn at 53.3 percent. The middle schools range from 66.0 to 77.8 percent capacity, with Patti Welder Middle School operating at the lowest percentage. The average of the three middle schools is 72.9 percent. The efficiency rate of the Senior Campus is at 50.4 percent, while Stroman Campus' percentage of 95.5 percent exceeds the maximum efficiency rate standard of 70 to 85 percent by 10.5 percentage points (**Exhibit A-56**).

**EXHIBIT A-55
PLANT MAINTENANCE ORGANIZATION CHART
2003-04**



SOURCE: VISD, 2004

EXHIBIT A-56
FACILITY USAGE PER STUDENT FOR VISD SCHOOLS
2003-04

SCHOOLS	ENROLLMENT	PERMANENT CAPACITY	PORTABLE CAPACITY	TOTAL CAPACITY	PERCENTAGE OF STUDENT COUNT OF PERMANENT CAPACITY	PERCENTAGE OF STUDENT COUNT OF TOTAL CAPACITY
Elementary Schools						
Aloe Elementary	553	814		814	67.9%	67.9%
Chandler Elementary	591	814		814	72.6%	72.6%
DeLeon Elementary	606	858	44	902	70.6%	67.2%
Dudley Elementary	521	748		748	69.7%	69.7%
FW Gross Elementary	499	682		682	73.2%	73.2%
Guadalupe Elementary	123	176	22	198	69.9%	62.1%
Hopkins Elementary	458	792	44	836	57.8%	54.8%
Juan Linn Elementary	457	770	88	858	59.4%	53.3%
Mission Valley Elementary	209	242	110	352	86.4%	59.4%
O'Connor Elementary	583	814	154	968	71.6%	60.2%
Rowland Elementary	497	880		880	56.5%	56.5%
Shields Elementary	646	880	44	924	73.4%	69.9%
Smith Elementary	519	924		924	56.2%	56.2%
Vickers Elementary	564	748		748	75.4%	75.4%
William Wood Elementary	120	154	88	242	77.9%	49.6%
Total - Elementary Schools	6,946	10,296	594	10,890	67.5%	63.8%
Middle Schools						
Crain Middle School	1,011	1,050	250	1,300	96.3%	77.8%
Howell Middle School	1,066	1,400		1,400	76.1%	76.1%
Patti Welder Middle School	1,056	1,525	75	1,600	69.2%	66.0%
Total - Middle Schools	3,133	3,975	325	4,300	78.8%	72.9%
High Schools						
MHS - Stroman Campus	2,267	2,250	125	2,375	100.8%	95.5%
MHS - Senior Campus	1,614	3,050	150	3,200	52.9%	50.4%
Total - High Schools	3,881	5,300	275	5,575	73.2%	69.6%
All Schools						
Total - All Schools	13,960	19,571	1,194	20,765	71.3%	67.2%

SOURCE: VISD Plant Maintenance Capacity Report, May 2004 and Texas Education Agency 2003-04 PEIMS Student Enrollment

NOTE: Elementary school capacities are based on 22 students per instruction space and secondary schools capacities are based on 25 students per instruction space.

Two of the twenty schools, Patti Welder Middle School and Stroman Campus, are below gross square footage per student guidelines, and the remaining 18 schools were at or above these guidelines, as shown below in **Exhibit A-57**.

FACILITIES PLANS, POLICIES, AND PROCEDURES

An effective facilities planning organization involves a formal planning process and a formal facilities master plan that serves as a guide for the construction and renovation of facilities.

EXHIBIT A-57
GROSS SQUARE FOOTAGE AREA PER STUDENT FOR VISD SCHOOLS
2003-04

SCHOOL	DATE OPENED	TOTAL AREA (GSF)	2003-04 ENROLLMENT	GSF PER STUDENT	GUIDELINE (GSF)	BELOW GUIDELINE	AT GUIDELINE	ABOVE GUIDELINE
Aloe Elementary	1950	59,563	553	108	85-100			X
Chandler Elementary	2001	72,681	591	123	85-100			X
DeLeon Elementary	1980	59,773	606	99	85-100		X	
Dudley Elementary	1963	65,429	521	126	85-100			X
FW Gross Elementary	1959	48,514	499	97	85-100		X	
Guadalupe Elementary	1956	22,305	123	181	85-100			X
Hopkins Elementary	1953	64,383	458	141	85-100			X
Juan Linn Elementary	1950	56,117	457	123	85-100			X
Mission Valley Elementary	1937	27,151	209	130	85-100			X

EXHIBIT A-57 (CONTINUED)
GROSS SQUARE FOOTAGE AREA PER STUDENT FOR VISD SCHOOLS
2003-04

SCHOOL	DATE OPENED	TOTAL AREA (GSF)	2003-04 ENROLLMENT	GSF PER STUDENT	GUIDELINE (GSF)	BELOW GUIDELINE	AT GUIDELINE	ABOVE GUIDELINE
O'Connor Elementary	1956	66,321	583	114	85-100			X
Rowland Elementary	1967	65,724	497	132	85-100			X
Shields Elementary	1953	67,286	646	104	85-100			X
Smith Elementary	1958	61,220	519	118	85-100			X
Vickers Elementary	1966	62,272	564	110	85-100			X
William Wood Elementary	1951	22,418	120	187	85-100			X
Crain Middle School	1954	127,282	1,011	126	110-125			X
Howell Middle School	1970	135,904	1,066	127	110-125			X
Patti Welder Middle School	1962	103,592	1,056	98	110-125	X		
MHS – Stroman Campus	1967	259,563	2,267	114	135-150	X		
MHS – Senior Campus	1958	291,168	1,614	180	135-150			X
Total		1,738,666	13,960			2	2	16

SOURCE: VISD Facilities, Student Enrollment from 2003-04 PEIMS data.

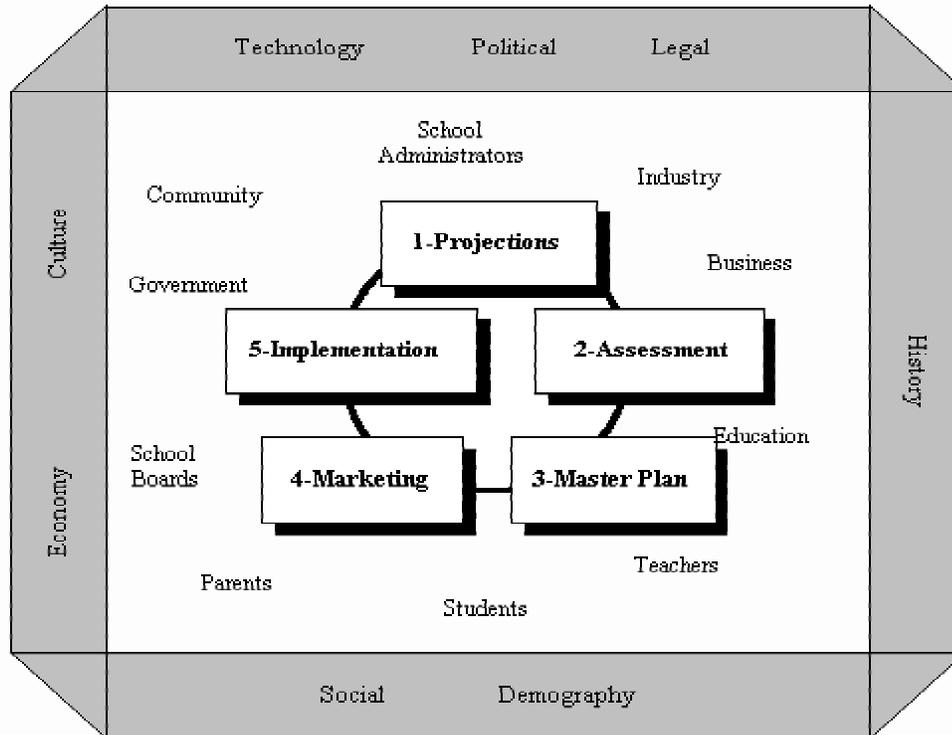
Exhibit A-58 presents a framework for analyzing facilities planning efforts. External factors to be considered in facilities planning include demographics; social, cultural, and economic trends; and technology.

An effective master plan builds on a school district's strategic plan, incorporating projected demographic trends, facility repair, and renovation needs and educational and operational space requirements.

Community involvement and proper coordination with school administrators and other key personnel also are important. Finally, the plan should include critical timelines necessary to complete facility construction within the constraints of the educational calendar.

The board adopts policies governing the district's facility operations as well as policies that are directed at other programs but have an indirect impact on

EXHIBIT A-58
FACILITIES MASTER PLANNING MODEL



SOURCE: Texas School Performance Review.

facilities operations. Procedures show district employees how to carry out the policies in their various functional areas. Taken together, planning is reinforced through well-documented policies and procedures.

Exhibit A-59 reviews the size and age of all buildings within the district that are 25 years or older.

School facilities, buildings, grounds, parking lots, and sports structures represent the largest fixed asset class of any school district. The replacement value of VISD's approximately 2,000,000 square feet of buildings is over \$200 million. Without proper maintenance and facility upgrades, these assets lose value and can present unsafe, unhealthy, and/or

unsupportive learning environments. In order to adequately maintain facility assets, school districts must monitor facility condition and commit the funding required to maintain the value of assets.

The Plant Maintenance Department staff provided the review team with detailed assessment forms for each of the district's facilities dated December 2002. The director of Plant Maintenance and Purchasing, coordinators, foremen, the master electrician, and the energy manager performed the assessments. These assessments entailed visiting each facility to identify all required repairs at that location. Staff used a checklist to identify items needing repair or replacement and noted their observations in a

**EXHIBIT A-59
VISD FACILITIES 25 YEARS OR OLDER**

SCHOOL NAME	GRADES	YEAR BUILT/ (RENOVATED)	YEAR RENOVATED	BUILDINGS 25 YEARS OR OVER	YEARS SINCE RENOVATION*
Mitchell Guidance Center	6-12				
Building A		1901		103	
Building B		1948		56	
Building C		1966		38	
Memorial HS - Senior Campus	9-12				
Building A		1958 / (1990)	1990	46	14
Building B		1965 / (2001)	2001	39	3
Building C		1958 / (1999)	1999	46	5
Building D		1963		41	
Building E		1963 / (2000)	2000	41	4
Building F		1963 / (2000)	2000	41	4
Building G		1966		38	
Building H		1977		27	
Building J		1965		39	
Building K		1967		37	
Building L		1967		37	
Building N		1967		37	
Memorial HS - Stroman Campus	9-10				
Building A		1967 / (2003)	2003	37	1
Building B		1967		37	
Building C		1968 / (2002)	2002	36	2
Building D		1968		36	
Building E		1968		36	
Building F		1968 / (2000)	2000	36	4
Building G		1968		36	
Building H		1968		36	
Building I		1968		36	
Crain Middle School	6-8				
Building A		1954 / (2001)	2001	50	3
Building B		1954 / (2004)	2004	50	0
Building C		1954 / (2004)	2004	50	0
Building F		1964		40	
Building G		1954 / (1990)	1990	50	14
Building H		1954		50	
Building I		1954		50	
Building J		1984		20	
Building K		1966		38	
Building L		1966		38	
Patti Welder Middle School	6-8				
Building B		1962	2001	42	3
Building C		1966	2001	38	3
Building E		1962		42	
Building G		1962		42	
Building H		1962		42	
Stadium		1938		66	

EXHIBIT A-59 (CONTINUED)
VISD FACILITIES 25 YEARS OR OLDER

SCHOOL NAME	GRADES	YEAR BUILT/ (RENOVATED)	YEAR RENOVATED	BUILDINGS 25 YEARS OR OVER	YEARS SINCE RENOVATION*
Howell Middle School	6-8				
Building A		1970		34	
Aloe ES	EE – 05				
Building A		1950 / (2001)	2001	54	3
Dudley Magnet	PK – 05				
Building A		1963		41	
F.W. Gross Elementary	EE – 05				
Building A		1959 / (2003)	2003	45	1
Building B		1962		42	
Building C		1963		41	
Building D		1939 / (2001)	2001	65	3
Guadalupe Elementary	EE – 05				
Building A-B		1956 / (1998)	1998	48	6
Hopkins Elementary	PK – 05				
Building A		1953 / (1999)	1999	51	5
Building B		1954 / (1999)	1999	50	5
Building C		1966		38	
Juan Linn Elementary	EE - 05				
Building A		1950 / (2003)	2003	54	1
Building B		1955 / (2002)	2002	49	2
Building C		1966		38	
O'Connor Elementary	PK - 05				
Building A		1956	1998	48	6
Rowland Elementary	EE – 05				
Building A		1967		37	
Shields Elementary	EE – 05				
Building A		1953		51	
Building B		1956		48	
Smith Elementary	PK – 05				
Building A		1958	1998	46	6
Building B		1963	1998	41	6
Vickers Elementary	EE – 05				
Building A		1966	2000	38	4
William Wood Elementary	PK – 05				
Building A		1951	2002	53	2
Building B		1951	2002	53	2
Building C		1951	2002	53	2
Building D		1951		53	
Mission Valley Elementary	KG – 05				
Building A		1937	2000	67	4
Building B		1937		67	
Building C		1937		67	
Building D		1937		67	
Building E		1937		67	
Building F		1937		67	
Family Connection					
Building A		1957	1980	47	24
Hope School- *Part of Transportation/Maintenance					
Building A		1966		38	
Career Development School					
Building A- *Part of 102 Profit Drive		1967		37	
Maintenance * Part of Transportation/Maintenance					
1411 North Nimitz		1979		25	
Administration					
Building A (includes Administration, Warehouses, Career Development Center & Profit Academic Center)		1960	1979	44	25

SOURCE: VISD Plant Maintenance Report, 2004.

* Some buildings have probably been renovated, but specific dates are not readily available.

comments section on the form. **Exhibit A-60** is a representation of the checklist form and the types of observation/determination categories used by staff in the assessment process.

provided to the school board’s facility committee members, and each year during the budget process the superintendent determines which projects should be budgeted for the upcoming fiscal year.

The Plant Maintenance staff stated that information from the assessment forms is used to develop the Annual Facility Projects List. This project list is

**EXHIBIT A-60
VISD PLANT MAINTENANCE DEPARTMENT
EXAMPLE OF THE FACILITY ASSESSMENT FORM
DECEMBER 2002**

CAMPUS DATE BUILDING LETTER LOCATION	CATEGORIES/SUBCATEGORY	SATISFACTORY	REPAIRS ONLY	REPLACEMENT	N/A	COMMENTS
Interior Building	Flooring <ul style="list-style-type: none"> ▪ Wood ▪ Carpet ▪ Concrete Ceiling Doors <ul style="list-style-type: none"> ▪ Interior ▪ Exterior Mill Work Painting ADA Toilet Partition					
Exterior Building	Sidewalks Ramps Handrails Covered Walkways Grass Fences Gutters					
Exterior Grounds	Playground Basketball Goals Equipment Fall Zones Borders/Painting Drainage Sprinkler System					
HVAC Interior	Emergency Management System Exhaust Fans Grills Ducts Thermostats Window Units					
HVAC Exterior	Cooling Tower Pumps Piping Roof Top Unit Pad Mounted Condenser Unit					
Electrical Interior	Life Safety – Alarms Public Announcement System Phones Lighting Security – Emergency lights Security – Building					

**EXHIBIT A-60 (CONTINUED)
VISD PLANT MAINTENANCE DEPARTMENT
EXAMPLE OF THE FACILITY ASSESSMENT FORM
DECEMBER 2002**

CAMPUS DATE BUILDING LETTER LOCATION	CATEGORIES/SUBCATEGORY	SATISFACTORY	REPAIRS ONLY	REPLACEMENT	N/A	COMMENTS
Electrical Exterior	Lighting – Building Lighting – Area Lighting Main Service					
Plumbing Interior	Drinking Fountains Toilets Urinals Lavatories Hot Water					
Plumbing Exterior	Storm Drains Water Lines Gas Lines Water Wells Septic System					
Asbestos						

SOURCE: VISD Plant Maintenance Department, April 2004.
NOTE: this table does not include all the sub categories in the actual assessment form.

CONSTRUCTION MANAGEMENT

Construction projects are usually the largest single expenditures made by school districts. Prudent construction management techniques help ensure projects are completed in a timely fashion and within budget.

Like many other districts, VISD has built its portfolio of facilities over decades. Most recently, VISD has been in the last stages of a \$31 million bond program to enhance the school facilities. VISD uses two methods to provide construction management for capital projects. For construction projects performed by the Plant Maintenance Department and smaller construction projects, the construction coordinator provides construction management and supervision. In this role the construction manager works directly with district personnel or contractors at each step of the project to monitor progress, discuss upcoming activities, and identify potential problems.

For larger projects, VISD contracts services through an architect and/or engineer to perform construction management services. In these cases, the activities are similar, but instead are provided by the supervising contractor.

MAINTENANCE OPERATIONS

Effective school maintenance operations require timely and accurate information to plan and manage daily operations; a comprehensive work order system that ensures quick response to school needs and also

collects information regarding equipment and related cost of repairs; a preventive maintenance process that minimizes downtime, reduces costs, and extends equipment life; and a method to monitor service levels and obtain feedback for improvement.

The VISD Plant Maintenance Department is responsible for maintaining all district facilities, including the grounds. The department has a staff of 81 including grounds keeping and a budget of \$11.1 million for fiscal year 2003–04. The district maintains 25 schools, which include 15 elementary schools, three middle schools, one high school with two campuses, five special purpose schools, and seven support facilities, totaling 165,000 GSF. Total VISD facilities include approximately 2.0 million square feet of space and 478 acres of ground. **Exhibit A-55** earlier presented the organizational chart of the department, and **Exhibit A-61** shows the number of employees by trade or job type for 2003-04.

Maintenance-operating expenditures decreased by 10.7 percent from 2002–03 to 2003–04. While expenditures per student increased by 13.0 percent over the past six years, student enrollment has dropped by 4.9 percent (**Exhibit A-62**).

Exhibit A-63 compares the maintenance and operations costs per student for VISD and its peer districts. The district’s salaries and wages are higher than its peers and the peer average, and it spends the least in contracted services, primarily due to the district performing much of the maintenance work in-house. VISD’s ‘Other Operating Costs’ are

EXHIBIT A-61
VISD MAINTENANCE PERSONNEL
2003-04

JOB TYPE/TRADE	NUMBER OF POSITIONS
Administrative Support	2
Administrator	1
Air Conditioning (Including 5 Filter Changers)	10
Construction	13
Electrical	6
Energy Management	1
Mechanics	3
Mill Shop	2
Painters	9
Plumbing	3
Risk Management/Environmental	3
Road & Grounds (includes furniture movers, garbage collector)	23
Vehicle shop	3
Welders	1
Work order clerk	1
Total	81

SOURCE: VISD, May 2004.

EXHIBIT A-62
PLANT MAINTENANCE AND OPERATIONS
VISD ACTUAL OPERATING EXPENDITURES AND COST PER STUDENT
1998-99 THROUGH 2002-03

OBJECT CODE	1998-99 ACTUAL	1999-2000 ACTUAL	2000-01 ACTUAL	2001-02 ACTUAL	2002-03 ACTUAL	2003-04 BUDGET	PERCENT CHANGE FROM 1997-98 TO 2002-03
Total Operating Expenditures	\$9,170,873	\$10,027,621	\$10,232,059	\$10,118,713	\$11,032,666	\$9,853,462	7.4%
Expenditure % Change		9.3%	2.0%	(1.1%)	9.0%	(10.7%)	
Cost per Student	\$609.00	\$684.15	\$710.02	\$704.65	\$764.14	\$688.28	13.0%
Cost per Student % Change		12.3%	3.8%	(0.8%)	8.4%	(9.9%)	
Student Enrollment	15,059	14,657	14,411	14,360	14,438	14,316	(4.9%)
Student Enrollment % Change		(2.7%)	(1.7%)	(0.4%)	0.5%	(0.8%)	

SOURCE: Texas Education Agency, PEIMS Function 51.

EXHIBIT A-63
VICTORIA ISD & PEERS
PLANT MAINTENANCE AND OPERATIONS
ACTUAL OPERATING EXPENDITURES PER STUDENT
2002-03

OBJECT CODE	BRYAN ISD	LAMAR CISD	TYLER ISD	VICTORIA ISD	WICHITA FALLS	PEER AVERAGE	(OVER) / UNDER
Salaries & Wages	\$359.07	\$384.87	\$254.52	\$405.60	\$172.45	\$292.73	\$(112.87)
Contracted Services	244.93	329.62	265.99	176.47	460.19	325.18	48.71
Supplies & Materials	50.57	43.69	52.53	70.54	87.33	58.53	(12.01)
Other Operating Costs	27.43	28.25	10.24	111.53	23.90	22.45	(89.07)
Total	\$682.01	\$786.44	\$583.28	\$764.14	\$743.87	\$698.90	\$(65.24)
Student Enrollment	13,927	16,923	17,031	14,438	14,951	15,708	1,270
Salaries & Wages as a Percent of Total	52.6%	48.9%	43.6%	53.1%	23.2%	41.9%	11.2%

SOURCE: Texas Education Agency, PEIMS Function 51.

significantly higher than its peers, primarily due to the method the district uses to record preventive maintenance costs, and hurricane damage costs. VISD spends 11.2 percent more of its total maintenance expenditures on salaries and wages than the peer average, yet has 1,270 fewer students.

Exhibit A-64 compares the in-house costs to contracted services per student related to maintenance operations for VISD and its peer

districts. VISD's salaries and wages are highest when compared to its peer districts and the peer average, and is the second lowest when comparing total contracted services costs.

The 2002-03 Plant Maintenance Department expenditures are compared with regional averages for public schools in **Exhibit A-65**. These averages are the result of an annual survey of public school districts with 600 or more students conducted by the

**EXHIBIT A-64
VISD AND PEERS SELECTED ACTUAL EXPENDITURES COMPARISON OF
IN-HOUSE EXPENDITURES TO CONTRACTED SERVICES RELATED TO MAINTENANCE
2002-03**

OBJECT CODE	BRYAN ISD	LAMAR CISD	TYLER ISD	VICTORIA ISD	WICHITA FALLS	PEER AVERAGE	(OVER) / UNDER
Costs Associated with Performing Work In-house							
Salaries & Wages	\$359.07	\$384.87	\$254.52	\$405.60	\$172.45	\$292.73	\$(112.87)
Insurance and Bonding Costs	24.79	26.20	9.27	29.02	20.03	20.07	(8.95)
Total In-house Costs	\$383.86	\$411.08	\$263.80	\$434.63	\$192.48	\$312.80	\$(121.82)
Costs Associated with Contracted Services							
Professional Services	\$2.95	\$2.41	\$9.63	\$1.62	\$0.00	\$3.75	\$2.13
Contracted Maintenance and Repair	26.51	92.35	84.85	34.96	288.88	123.15	88.19
Miscellaneous Contracted Services	0.00	2.40	0.01	8.25	5.30	1.93	(6.32)
Total Contracted Services *	\$29.46	\$97.16	\$94.49	\$44.83	\$294.19	\$128.83	84.00
Grand Total	\$413.32	\$508.24	\$358.29	\$479.46	\$486.67	\$441.63	\$(37.82)

SOURCE: Texas Education Agency, PEIMS Function 51.

* VISD's contracted services are understated because some contracted services expenditures relating to preventive maintenance are recorded as miscellaneous other operating costs.

**EXHIBIT A-65
VISD PLANT MAINTENANCE DEPARTMENT
2002-03 TOTAL ACTUAL EXPENDITURES
COMPARED TO REGION SIX AVERAGES**

COST PER SQUARE FOOT	MAINTENANCE & OPERATIONS EXPENDITURES
VISD Cost Per Student	\$764
ASU Region Six Average Cost Per Student	602
Difference	\$162
VISD Cost Per Square Foot	\$5.43
ASU Region Six Average Cost Per Square Foot	3.46
Difference	\$1.97

SOURCE: American School and University (ASU) 2001 survey of public schools in the southwest and TEA, PEIMS Function 51.

American School and University (ASU), a professional association focused on the business of managing educational facilities. Texas school districts are included in Region Six along with Louisiana, Oklahoma, New Mexico and Arkansas. In comparing VISD to Region Six, VISD spends more both per student and per square foot. The comparison shows that VISD spends 26.9 percent more per student and 56.9 percent more per square feet than the Region Six average.

CUSTODIAL OPERATIONS

The Plant Maintenance Department is responsible for housekeeping programs for the district. Custodial services are provided to each school, with personnel reporting to the Plant Maintenance Department's custodial supervisor.

Campuses are assigned one or more head custodians to manage the custodians at each location. The proper chain of command for principals or department heads is to first address any special requests or problems with the head custodians. If their concerns are not addressed, principals can address their problems or complaints with the custodial supervisor and, as a final resort, to the director of Plant Maintenance and Purchasing.

The custodial supervisor works closely with school principals to ensure the department is meeting expectations for custodial services. Although school administrators do not directly manage custodians, many principals include them as part of the school personnel in many events and staff meetings.

ENERGY MANAGEMENT

The goal of energy management is to control the operating costs of facilities while providing a safe and comfortable environment for learning.

VISD currently employs a single individual as the energy manager. The energy manager's primary responsibilities include reviewing utility bills, programming the energy management system (EMS), scheduling after hours air-conditioning at individual schools, and providing energy education to schools and administrators. In addition, the energy manager is currently operating VISD's geographic information system (GIS) due to his computer skills.

Over the past five years, VISD has decreased its energy consumption by 13.9 percent. **Exhibit A-66** shows the total expenditures for utilities for the past five years. While the savings are significant and admirable, the lack of data within VISD makes it difficult to determine how VISD realized the savings.

EXHIBIT A-66
VISD UTILITIES EXPENDITURES

OBJECT CODE	1999-98	2000-01	2001-02	2002-03	2003-04	% OF TOTAL
Utilities	\$2,203,102	\$2,386,560	\$2,963,753	\$2,516,667	\$1,896,688	(13.9%)

SOURCE: Texas Education Agency PEIMS 1999 through 2003.

Discussions with the energy manager and other personnel suggest that most of the savings are probably due to the significant amount of mechanical equipment replacement and the widespread implementation of the energy management system.

**REVIEW AND EVALUATION OF
 CONTRACT PROCESSING**

Maintenance operations provide many opportunities to contract with private entities or other governmental entities to lower the overall costs or increase the overall service level of providing maintenance services. School districts, like other large facilities organizations, typically contract for some services while performing other services in-house. The decision to perform in-house versus contracting revolves around how critical the service is and how much savings can actually be achieved by contracting.

VISD conducts many maintenance and construction services in-house. Examples of services that VISD performs in-house that may be candidates for contracting, either partially or fully include:

- general renovations to classrooms;
- installation of new mechanical equipment and systems for school renovations;
- construction and installation of casework (cabinetry);
- repair of small electronic equipment such as VCRs;
- trash collection and dumping; and
- grounds services.

**CHAPTER 6
SAFETY AND SECURITY**

Ensuring a safe and secure district requires coordination between district and campus administrators, teachers, counselors, students, parents, board members, and the community. Such coordination requires a district-wide approach to safety and security. Staff resources must be organized in a way that minimizes duplication while at the same time ensures that all critical functions are assigned to a department or staff member; effective communication must exist so that information pertaining to safety and security can be shared; and reporting systems must be in place to ensure that all schools are consistently ensuring the safety of their students and employees.

In its publication, *Keeping Texas Children Safe in School*, the Texas School Performance Review (TSPR) notes that the most effective districts have a safety plan that includes strategies for prevention, intervention, and enforcement. Prevention is the foundation laid to deter crime and violence. Intervention describes an action step in the safety process—stepping in when crime or violence occurs and stopping it before it becomes a disaster. Enforcement addresses what to do after crime or violence has occurred. Enforcement in public schools includes enforcing school rules, administering punishment as applicable, and helping children who have disobeyed the rules learn how to alter their behavior. The report outlines suggested steps to take for each strategy, as shown in **Exhibit A-67**.

The Texas Legislature has also contributed and continues to contribute to the safe school effort by providing legislation related to a number of safety and accountability standards for Texas schools, as displayed in **Exhibit A-68**.

Finally, federal legislators support safe schools by providing funding to state and local governments for the Safe and Drug Free Schools (SDFS) program.

This funding promotes the development of programs that prevent violence in and around schools. The authorization for the program is found in Title IV of the federal *No Child Left Behind* Act of 2001. Texas schools that receive Title IV funds are given the discretion to decide the most effective way to apply the money and are required to report violence incident rates to the state. The Texas Education Agency (TEA) serves as the fiscal agent that distributes SDFS monies to the participating districts in Texas.

ORGANIZATION AND STAFFING

Organization and management are critical in reaching the goal for safety and security in the schools and communities. Each school district has to choose the programs and plans that best meet their goals and philosophies. According to the National Education Association (NEA):

“Students learn best and achieve their full potential in safe and orderly classrooms. This positive academic environment begins with safe families and safe communities. Statistically, schools continue to be one of the most secure places for our children. ...Some of us argue for ‘hard’ responses such as metal detectors, added security personnel and zero-tolerance for weapons possession. Others favor ‘soft’ solutions that include more counseling, conflict-resolution programs and better communications between school and home. It will take a combination of both approaches—administered with reason and centered in respect—to keep our children from harm.”

The district and the VPD are seeking grant funding of \$250,000 from the Office of Community Oriented Policing Services of the U.S. Department of Justice (COPS). The three year grant funding would pay for the majority of the cost to staff two additional

**EXHIBIT A-67
KEEPING TEXAS CHILDREN SAFE IN SCHOOL
JANUARY 2000**

STRATEGY	STEPS TO TAKE
Prevention	Know your goals and objectives: where your district is going and what you want to accomplish. Establish clear expectations for students, parents, teachers, and administrators. Address warning signs before they turn into trouble.
Intervention	Look for trouble before it finds you. Recognize trouble when you see it. Have individuals in the right place and at the right time to intervene. Have a plan of action appropriate for the occasion and practice it.
Enforcement	Leave no room for double standards. Ensure that discipline management extends inside and outside the classroom. Alternative programs are not just a matter of compliance with the law; they are many students’ last chance at success.

SOURCE: Texas School Performance Review (TSPR), *Keeping Texas Children Safe in Schools*, January 2000.

EXHIBIT A-68
MAJOR SCHOOL SAFETY INITIATIVES OF THE TEXAS LEGISLATURE
1993-2001

LEGISLATION	SUMMARY
1993 LEGISLATURE	
House Bill 23	Required information-sharing between law enforcement and schools on student arrests for serious offenses; required school principals to notify law enforcement if criminal activity occurs or is suspected of occurring on school grounds.
Senate Resolution 879	Encouraged collaboration between the Texas Education Agency and Department of Public Safety in the recording of criminal incidents in the schools.
House Bills 633 and 634	Outlined the commissioning and jurisdiction of peace officers for school districts.
House Bill 2332	Authorized the State Board of Education to establish special-purpose schools or districts for students whose needs are not met through regular schools.
Senate Bill 16	Defined drug-free zones for schools.
Senate Bill 213	Created the safe schools checklist.
Senate Bill 155	Created the Texas Commission on Children and Youth.
1995 LEGISLATURE	
Senate Bill 1	Revamped the Education Code and laws on safety and security in schools, including the requirement for districts to establish alternative education programs and, in counties with populations above 125,000, to establish juvenile justice alternative education programs.
1997 LEGISLATURE	
Senate Bill 133	Rewrote the safe schools provision of the Education Code.
1999 LEGISLATURE	
Senate Bill 260	Allowed the expulsion of a student who assaults a school district employee.
Senate Bill 1580	Created the Texas Violent Gang Task Force.
Senate Bill 1724	Required each school district to annually report (beginning with 1999-2000) the number, rate, and type of violent and criminal incidents occurring on each school and required them to include a violence prevention and intervention component in their annual school improvement plans.
Senate Bill 1784	Allowed school districts to use private or public community-based dropout recovery education programs to provide alternative education programs.
House Bill 152	Made the act of placing graffiti on school property a state jail felony.
House Bill 1749	Encouraged school districts and juvenile probation departments to share information on juvenile offenders.
2001 LEGISLATURE	
Senate Bill 430	Funded the Texas School Safety Center, which provides a resource for schools on safety training and school safety audits and set training standards for school resource officers.
Senate Bill 1432	Defined the duties and powers of peace officers and attendance officers in enforcing truancy laws.
House Bill 1088	Added additional categories of misbehavior, including false alarms or threats made by a student, as reasons for removal to an alternative education program.
House Bill 2204	Established the Safe Routes to School Program to provide funds for safety projects in and around schools.

SOURCE: TSPR 1999 and updated through Texas Legislature Online 2001.

School Resource Officers (SROs): one at the Stroman Campus and one at the Mitchell Guidance Center. The school board approved the district's request to proceed with the application for the grant at the May 20, 2004 board meeting.

The purpose of the SROs is to deter crime. As part of this effort, the SROs interact with students in the classroom by presenting safety, crime prevention, and law enforcement career information. The SROs also present safety and crime prevention training to school staff, such as methods to improve building security, and handle reports by school administrators on criminal activity, including student infractions that break the law. The SROs receive training in working with youth and in school districts through state and federal government workshops for SROs, covering such topics as "When is behavior a crime?" and "Guns, gangs, and drugs in school."

PLANNING, BUDGETING AND PERFORMANCE MEASURES

Senate Bill 1724, passed by the 76th Texas Legislature in 1999, requires districts to establish campus improvement plans that must contain goals for the prevention of violent incidents. Schools must also implement a comprehensive safety plan that includes the functional elements necessary to achieve the adopted violence prevention goals. Properly functioning schools foster learning, safety, and socially appropriate behaviors. They have a strong academic focus and support high student achievement, foster positive relationships between staff and students, and promote meaningful community and parental involvement. Most effective prevention programs in schools address many factors and recognize that safety and orderly conduct contribute to and are necessary for social, emotional, and academic development of students. The

following are just a few elements in a good comprehensive safety program:

- a focus on safety and orderly behavior in all schools and at all levels;
- clear, enforceable rules and expectations for behavior and school performance;
- clear statements of student and staff responsibilities;
- professional development for teachers, staff, and volunteers in all aspects of safety, supervision, classroom management, and crisis intervention;
- procedures for identifying and responding to the needs of at-risk and disruptive students; and
- adequate adult supervision of students.

Weapons used in or around schools, bomb threats, and fights, as well as natural disasters, accidents, and potential suicides call for immediate action and long-term intervention. Appropriate planning and preparation for these events reduces chaos and trauma for those involved.

Early Warning, Timely Response: A Guide to Safe School, published by the U.S. Department of Education in 1998, notes that crisis intervention plans should include the following:

- Training for teachers and staff in a variety of skills ranging from dealing with escalating classroom situations to responding to a serious crisis.

- Reference to district or state procedures. Many states now provide recommended crisis intervention to their local education agencies and schools.
- Involvement of community agencies, including police, fire, and rescue, as well as hospital, health, social welfare, and mental health services. The faith community, juvenile justice, and related family support systems also have been successfully included in such team plans.
- Provision for the core team to meet regularly to identify potentially troubled or violent students and situations that may be dangerous.

Staff and students should test a district’s emergency plan’s effectiveness until responses become automatic and consistent.

Goals for increasing discipline management and maintaining a safe district are included in the district’s annual planning process. In the 2003-04 District Improvement Plan (DIP), the district addresses discipline management and safe schools in three of seven goals. In addition to the DIP, the district also has developed a strategic plan in which safety and security is addressed in its first goal: A safe and secure learning environment. **Exhibit A-69** details the discipline management/safe schools goals and action steps outlined to accomplish this goal. Each action has the implementation or design steps along with a timeline and space to document that the district has made to meet those steps.

**EXHIBIT A-69
VISD DISTRICT IMPROVEMENT PLAN
2003-04**

AREA: DISCIPLINE MANAGEMENT/SAFE SCHOOLS
GOAL 2: TO INCREASE THE AVERAGE DAILY ATTENDANCE OF STUDENTS BY .5%.
Action Step
2.1: Continue efforts to increase districtwide attendance.
2.2: Maintain district truancy program
GOAL 3: TO DECREASE THE PERCENTAGE OF DROPOUTS TO LESS THAN 1% OF THE TOTAL STUDENT POPULATION.
Action Step
3.1: Identify and recover dropouts in grades 6-12.
3.2: Implement pregnancy related services (PRS) student attendance accounting procedures.
GOAL 4: TO DECREASE THE NUMBER OF INSTANCES OF VIOLENT ACTS AND THE USE OF TOBACCO, ALCOHOL OR OTHER DRUGS BY VISD STUDENTS BY 10%.
Action Step
4.1: Implement student code of conduct districtwide.
4.2: Provide student-learning programs for students in disciplinary alternative education placement – grades 6 through 12.
4.3: Implement school community outreach program.
4.4: Create and provide professional development focused on decreasing violent acts.
4.5: Design or enhance programs that serve as interventions for student and their families who are suffering from drug or alcohol abuse.

SOURCE: VISD District Improvement Plan, 2003-04.

OPERATIONS MANAGEMENT

Security functions include the enforcement of state and local laws, school rules, and the administration of appropriate punishment. Effective enforcement must be fair, consistent, certain, and swift, while still allowing for open communications among students and security personnel. Basic security and enforcement functions are essential to control day-to-day student activities and ensure that students comply with established codes of conduct.

VISD district administrators and principals, assistant principals, and SROs from two schools attended a one-week training course offered by the School Resource Officer Leadership Program during the 2003–04 school year. The assistant superintendent of School Administration said that other schools are scheduled to attend the program in 2004–05.

This training program assists each school and community in developing its own strategies for achieving a safe school environment. The School Resource Leadership Program is one of three programs offered by the Comprehensive School Safety Leadership Initiative. Using a COP grant, the Fox Valley Technical College (FVTC) of Appleton, Wisconsin and the National Center for Missing and Exploited Children (NCMEC) in Alexandria, Virginia, in conjunction with the Office of Juvenile Justice and Delinquency Prevention, implemented a Comprehensive School Safety Leadership Initiative. The Comprehensive School Safety Leadership Initiative provides targeted training designed to reach a wide audience, including school and law enforcement executives, SROs, and other police and school district staff.

The program demonstrated standards of excellence and best practices for the enhanced role of SROs as leaders in planning and maintaining a safe school environment. Subjects covered in this program were roles, responsibilities, and behaviors of the organizations and systems in the community and schools; legal issues facing SROs in a school environment; and best practices regarding community policing and the SRO and school safety plan.

STUDENT BEHAVIOR MANAGEMENT

The U.S. Department of Education's publication *Early Warning, Timely Response* defines a well-functioning school as one that fosters "learning, safety, and socially appropriate behaviors." These schools have a strong academic focus and support students in achieving high standards, foster positive relationships between school staff and students, and promote meaningful parental and community involvement. Most prevention programs in effective

schools address multiple factors and recognize that "safety and order are related to children's social, emotional, and academic development."

The Texas Education Code, Chapter 37, requires that schools provide standards for conduct and discipline by adopting a student code of conduct. VISD provides a student code of conduct to students and parents annually. The code is accompanied by an acknowledgement that the rules were read and understood, which students must return.

The district's discipline management program is coordinated through each campus principal. The principal is responsible for conducting student hearings for violations of the district's Student Code of Conduct and for monitoring and tracking student disciplinary actions, including referrals to alternative education programs and expulsions.

In December 2003, VISD formed a Substance Abuse Task Force to explore ways to combat the problems the district is experiencing with tobacco, alcohol, and drug incidents. The task force has approximately 50 members, made up of district staff and community members. The task force was assigned the following three tasks:

- review, evaluate, and propose new policies, procedures, and regulations;
- research, evaluate, and recommend best practices used within and outside of the district; and
- conduct student and parent forums on drug awareness and intervention.

Three subcommittees, Policy, Research, and Student/Parent Forums, were formed and assigned one specific task. The full committee and each subcommittee have met multiple times and presented a progress report at the February 19, 2004 board meeting, a preliminary report at the April 15, 2004 meeting, and final recommendations at the May 20, 2004 meeting. **Exhibit A-70** lists the recommendations approved by the board at the May 2004 board meeting.

ALTERNATIVE EDUCATION PROGRAMS

Student discipline management includes processes for ensuring that students with disciplinary problems receive appropriate services and/or sanctions. In-school disciplinary programs provide one option for students, while Alternative Education Programs (AEP) offers specialized learning environments outside of the regular classroom. Disciplinary Alternative Education Programs (DAEP) provides intervention services and accelerated learning

**EXHIBIT A-70
EXCERPT FROM THE VISD CODE OF CONDUCT**

COMMITTEE	RECOMMENDATIONS
Policy Committee	<ul style="list-style-type: none"> ▪ Implement at Mitchell Guidance Center a drug education program for first time offenders (being under the influence or possession of a drug); ▪ Provide staff development opportunities for VISD administrators in the following areas: ▪ legal issues dealing with detection of illegal substances and other related issues; ▪ signs and symptoms of an individual under the influence; and ▪ how to recognize an illegal substance; ▪ Develop a more comprehensive canine procedure for secondary campus searches including coordination of personnel to assist with the process; and ▪ Increase the number of canine searches for the secondary campuses.
Student / Parent Forums	<p>The following recommendations are contingent upon receipt of the grant developed:</p> <ul style="list-style-type: none"> ▪ Provide community-based drug prevention education for businesses, faith organizations, and civic groups; ▪ Establish a media campaign to increase awareness of youth drug use and prevention strategies; ▪ Develop a three-year action plan to ensure elementary students are receiving appropriate prevention education; ▪ Introduce “Drug Free Victoria” a campaign to promote a substance-free lifestyle; ▪ Continue building on activities currently in place at the Memorial High School campuses with programs such as Students Against Drunk Drivers, Brighter Tomorrow Program, and Star Program; ▪ Promote more parent and community awareness through public forums; and ▪ Seek more “faith based” committee members on the committees to establish a student mentoring program.
Research	<ul style="list-style-type: none"> ▪ Continue to research and provide the Task Force with current data comparing VISD statistics to state and national norms; ▪ Develop a “scope and sequence” that will align all VISD drug prevention programs currently in place: Pre-K through Grade 12; and ▪ Evaluate all current VISD drug prevention programs at each grade level for effectiveness and appropriateness.

Source: VISD Substance Abuse Taskforce Presentation to the board, May 2004.

opportunities for at-risk students who also experience disciplinary problems. Students, parents, and teachers may also decide that voluntary student placement in one of these alternative programs is appropriate for a student.

The Texas Education Code, Chapter 37 requires that students who engage in serious misconduct must be removed from regular education settings. Violations are punishable, depending on the nature of the violation, by in-school suspension, placement in a DAEP or Juvenile Justice Alternative Education Program (JJAEP), or expulsion.

Specific information concerning the arrest or criminal conduct of students must be shared between law enforcement and local school districts. Moreover, the Education Code requires school districts, the juvenile board, and juvenile justice systems in counties with a population of 125,000 or more to establish a JJAEP. The JJAEP operates under the jurisdiction of the Texas Juvenile Probation Commission and is intended to provide for the education of incarcerated youths and youthful offenders.

VISD is located in Victoria County. As of 2000, Victoria County’s population was just over 84,000 and therefore, is not required to establish a JJAEP. In 2001-02, the district recognized the need for a JJAEP and created the Juvenile Center for Academic

Achievement (JCAA) for its expelled students using money from the Students in Needs of Assistance Program (SNAP). The SNAP grant was a three-year federal grant that expired in 2002–03. The district had some money left this fiscal year to continue to run the JCAA one more year. Although district staff informed the review team that it was important to keep it open, they were not sure that the district could afford to do so. At the time of the site visit, the JCAA had only four students in attendance, while the roster listed 25. The remaining 21 expelled students chose home assignment. In addition to the JCAA, VISD provides services to the Juvenile Detention Center, a county correctional facility for juvenile delinquents.

VISD has one long-term in-school suspension (ISS) program for grades nine through twelve located at the Senior campus. Short-term ISS, ten days or less, for grades nine and ten is at the Stroman campus and at the Senior campus for grades 11 and 12. Middle schools and elementary schools each have in-school suspension accommodations. The ISS programs at the middle school and elementary are staffed by teachers, while ISS at the high schools are staffed with paraprofessional staff.

The district operates three alternative education programs (AEP): Profit Academic Center, Mitchell Guidance Center, and Smith Elementary. Profit

Academic Center opened in 1989 and was started to meet the needs of students who were not successful in the traditional school setting. It represents a “second chance” for those students who might consider dropping out of school. Profit is an academic alternative school of choice. Students must meet admission requirements to be accepted. Profit has grown to 10 teachers and nearly 200 students since the center was established in 1989 with 112 students and 4 teachers.

The Mitchell Guidance Center is the district’s disciplinary alternative education program (DAEP) for the middle and high schools. Smith Elementary is the DAEP for elementary schools. A DAEP is an educational program provided by the school district for students who have engaged in serious misconduct, such as assault, drug/or alcohol-related offenses, public lewdness, glue or paint abuses, and unruly, disruptive, or abusive classroom behavior. The Mitchell Guidance Center is located off the regular campus so that students in DAEPs are separated from students in the regular program. The DAEP located at Smith Elementary provides a separate schedule to keep the DAEP students from interacting with non-DAEP students. For example, the DAEP students arrive and depart from school at separate times than the non-DAEP students. In addition, the DAEP students eat breakfast and lunch at their DAEP setting, separate from the non-DAEP student. The DAEP provides supervision and counseling and focuses on English language arts, mathematics, science, history, and self-discipline.

TRUANCY

Truancy issues, based upon students who miss school, are connected to compensatory education funding. The Elementary and Secondary Education Act was originally enacted in 1965 and serves as the largest federal aid program for elementary and secondary schools. School districts use compensatory funds to provide supplemental services to improve the educational performance of low-achieving students or students at risk of dropping out of school in high-poverty schools.

Schools nationwide are focusing on truancy. Justice agencies consider truancy a gateway to other more serious criminal offenses. High rates of truancy can be linked to higher daytime burglary and vandalism rates. Many districts throughout Texas welcome law enforcement assistance in their school attendance efforts. Information is not hoarded, but instead shared in an effort to reach the common goal of keeping children in school.

VISD created the Parent Liaison program in 1991 to establish a link between parents and the school

district regarding attendance issues. Two parent liaisons are assigned to the high school, one to each campus, and two jointly cover Profit Academic Center and Mitchell Guidance Center. The remaining twelve parent liaisons are assigned to the elementary schools. Ten of the elementary parent liaisons are assigned to a designated school while two liaisons work at two or three schools. The liaisons visit parents of students that have missed a significant number of school days and are in jeopardy of exceeding the maximum number of absent days allowed by the Texas Education Code. They work with parents to develop return-to-school plans to ensure that these students are within the 90% or more attendance requirements. In addition to addressing truancy issues, VISD liaisons identify family needs while on home site visits and work with local agencies to help students and families that require financial, medical, or housing assistance.

The attendance officers provide technical assistance relating to compulsory school attendance requirements by providing on-campus training, assisting parent liaisons with home visits, and providing attendance information to campus and school administrators upon request.

In addition to handling truancy issues for the district as a whole, the two attendance officers began to serve as attendance liaisons for the middle schools in 2003-04 when the parent liaison positions were eliminated due to the reduction of available funds. The middle schools requested that the attendance officers provide assistance with home visits to investigate truancy and chronic absenteeism. Before the district lost the Student In Need Of Assistance Program (SNAP) federal grant in the 2003-04 school year, each middle school employed a parent liaison. One parent liaison was paid from the SNAP grant and the remaining two positions were paid with local funds. In addition, three counselors were funded by the SNAP grant. Because of the loss of the grant, the principals elected to eliminate the parent liaison positions that previously served at each middle school and retained the existing counselor positions.

In 2002-03, the district’s annual dropout rate was 1.0 percent, a 64.3 percent decrease from 1998-99. The director of Student Services stated that the overall district-wide decline in dropout rates is attributable to various strategies. The attendance and parent liaisons make home visits to students that school administrators believe are at-risk of dropping out of school; the district partners with the law enforcement’s Helping Hands program, which provides visits to the county jail and permit students to have a two way dialogue with selected inmates; the district provides flexibility for students who attend the Profit Academic Center; and the district has new

education initiatives at the elementary school level that promote the benefits of a high school diploma. VISD has made progress over the dropout rates experienced in 1998–99 and 1999–2000. (Exhibit A-71).

**EXHIBIT A-71
VISD DROPOUT RATES
1998-99 THROUGH 2002-03**

YEAR	PERCENT OF DROPOUTS
1998-1999	2.8%
1999-2000	2.1%
2000-2001	1.6%
2001-2002	1.0%
2002-2003	1.0%

SOURCE: TEA, AEIS, 1999-2000 through 2002-03, and VISD Information Technology Department for 2002-03.

Exhibit A-72 compares the dropout rates at VISD to each of its peers, Region 3, and the state for 2001-02. At one percent, VISD has the third lowest dropout rate of its peers; however, it has a higher rate when compared to the Region 3 average of 0.5 percent and the state average of 0.9 percent.

**EXHIBIT A-72
VICTORIA ISD AND PEERS
DROPOUT RATES
2001-02**

DISTRICT	PERCENT OF DROPOUTS
Bryan ISD	0.9%
Lamar CISD	1.0%
Tyler ISD	1.2%
Victoria ISD	1.0%
Wichita Falls ISD	0.8%
Peer Average	1.0%
Region 3	0.5%
State	0.9%

SOURCE: TEA, AEIS, 2002-03.

VISD schools use various forms to take attendance. Most high schools and middle schools use scantrons, and elementary schools use attendance cards or student rosters to take attendance. High school and middle school teachers fill in the scantrons and place them outside the door of their classrooms each class period. Attendance clerks or students working in the office come by to collect the slips. Elementary teachers take attendance once a day in the morning. The parent liaison or student assistance collects the cards or rosters.

Liaisons interviewed from the high school campus stated that the slips are not always picked-up at each period; sometimes teachers forget to fill one out and will bring the slips to the attendance clerks at the end of the day. When the slips are received, the clerk processes the absence records.

The high school liaisons also stated that the attendance clerks are behind in the entry of excused absence notices, making the available computerized

information unreliable. To combat the entry timeliness problem, the liaisons have created a form used by teachers to report on students in their classrooms with excessive absences.

CRISIS MANAGEMENT

The district, in collaboration with the Victoria Police Department (VPD), formed a crisis management planning committee within the last year. Both entities recognized the need for a crisis operational plan that provides a consistent, coordinated response between the district, the police department, and other local public safety agencies appropriate to the type of incident. Members of the committee include the assistant superintendent of Administration, Transportation director, Food Services director, risk manager, elementary principal, secondary school assistant principal, SROs, and the Victoria police chief.

The VPD sponsored a training session for the committee to demonstrate the linkage between planning activities, setting policies, establishing procedures, training, response strategies, and execution necessary to bring a written plan into an effective, coordinated response in an actual emergency. This training was accomplished using crisis management software as well as lesson plans, training materials, and simulations. The software creates customized action guides, which are one-page consolidated plans that lead district personnel through individual roles in a crisis response. It includes an action guide for each simulated incident, and staff training is an integral part of this service. The training element assists staff in developing necessary skills, drill procedures, team building, and using simulation to practice decision-making in realistic scenarios. After the district performs the training exercise, the implementation of the plan is measured. The performance measurement module focuses on an “after action report” and “critique” and uses the debriefing information to refine the emergency procedures, improve training, and identify equipment needs, thereby improving response performance.

The review team interviewed several of the members of the committee and they described two crisis planning simulations that have been performed by the district. One was a simulation of a chemical spill incident, which involved the district, VPD, and the Victoria Fire Department. Although the district is making an effort to implement this plan, this program is still in its infancy and the district could not show the team timelines or evidence of an action plan to complete the analysis necessary to achieve the benefit offered by the use of this planning tool. However, this simulation tool and associated preparation drills are important steps to improving crisis response readiness.

CHAPTER 7

COMMUNITY INVOLVEMENT

Central to the social and economic success of America, public education provides a key opportunity to bring people together around a common purpose. However, to do so, public schools must meet basic educational needs. This requires that all community members, including parents, students, businesses, and educators take responsibility for what and how children learn. Excellence in public education depends upon a community that believes that all children have the right to a quality education and that it is the responsibility of a democratic society to provide the support and resources necessary for attainment.

According to *Vital Voices: Building Constituencies for Public School Reform*, across the country, community constituents collaborate with educators to set educational standards, recruit qualified teachers, and create new policies and programs that hold schools accountable. Similarly, educators are becoming constituency-builders by providing ways for individuals and community groups to learn more about the education system, acquire new skills, identify local issues, develop relationships, and take on new roles. Together, a school district and the communities it serves can change the way public institutions function to improve education over the long term. They can attend to how decisions are made, whose voices are heard, and which issues are considered legitimate. Excellent schools reach out to build civic capacity, forge relationships that foster diversity, and facilitate pursuit of common goals.

A 2003 study by the Southwest Educational Development Laboratory in Austin found that programs that try to build respectful and trusting relationships among school staff, families, and community members create and sustain these connections at all school levels. The study further showed that such schools genuinely welcome involvement; that those who engage diverse families are more comfortable addressing cultural differences; and that those who have an effective community involvement program value the importance of partnership and collaboration in successful educational development.

Involving the community fully and successfully in the educational efforts of a school district demands a well-forged reciprocal relationship between the district and its diverse constituencies. First and foremost, it requires vigilant commitment on the part of the school board and staff to deliver a high quality instructional experience to learners. In return, it asks that the community it serves to actively participate in this partnership to the fullest extent. School districts

have a legal and social mandate to respond to the needs of their communities and stakeholders, including students, staff, board members, parents, taxpayers, businesses, and certain special interest groups, as well as the various governing bodies that support them. However, if they are to do this well, they must be able to rely on their communities for active, dedicated support. They need to know that they can count on parents, local businesses, and area organizations to help when needed. Critical to the accomplishment of this vital partnership between a school district and the various community members it serves is open and direct communication. A well-conceived and respected partnership leads to more successful planning around common goals. Furthermore, it results in a better use of resources for mutual gain and educational enrichment that elevates and honors both district and community.

In 2003, following community dissatisfaction with over-crowding, mounting discipline problems, and safety concerns, the board and superintendent authorized a study of the educational programs and organizational structure of the consolidated high school. The purpose of the study was twofold: 1) to assess satisfaction levels of high school staff, students, and eighth graders on such variables as academics, extra-curricular activities, school climate, and safety; and 2) to assess satisfaction with the current high school configuration. Surveys revealed that the areas of greatest concern were school environment, campus safety, and student discipline.

The district also held student and public forums to solicit additional input on consolidation. Concurrently, a board planning committee began reviewing various alternatives to consolidation and narrowed the options to the following three:

- Option 1: Establish two separate high schools, that is, “re-configure” the single high school into two schools;
- Option 2: Maintain one high school, with special emphasis academies at various sites, including both the current campuses and elsewhere within the community; and
- Option 3: Establish a third separate high school.

By January 2004, with the community still divided over the options, the board decided to take a more “global view” and agreed to review the entire school structure at all grade levels.

ORGANIZATION AND MANAGEMENT

A school district’s organization and management generally determine how well educational services are delivered across the district. When a district includes the community in its decision-making, it is more

likely to rally support for new initiatives, foster trust in its efforts, and forge a reciprocal partnership that improves the quality of life for its community. In other words, an effective school district must be organized and managed to invite community input and commitment if it is to smoothly implement change.

Exhibit A-73 shows the personnel or departments most directly involved in community involvement activities.

PLANNING, POLICIES, AND PROCEDURES

Well-functioning school districts generally reflect a strong sense of community ownership coupled with the heavy involvement of community leaders and organizations in support roles, as well as the commitment of those on the front lines—the principals, teachers, and staff. School districts and communities that share a sense of vision and purpose and bind together on behalf of their future have a far better chance of ensuring educational attainment than those who cannot agree on a common direction.

VISD’s strategic plan acknowledges the importance of community involvement. For example, the district’s “vision” for a supportive environment involves the following:

- The community consistently celebrating the academic accomplishments of all students.
- The district partnering with higher education institutions to ensure that all students are

prepared to continue their education.

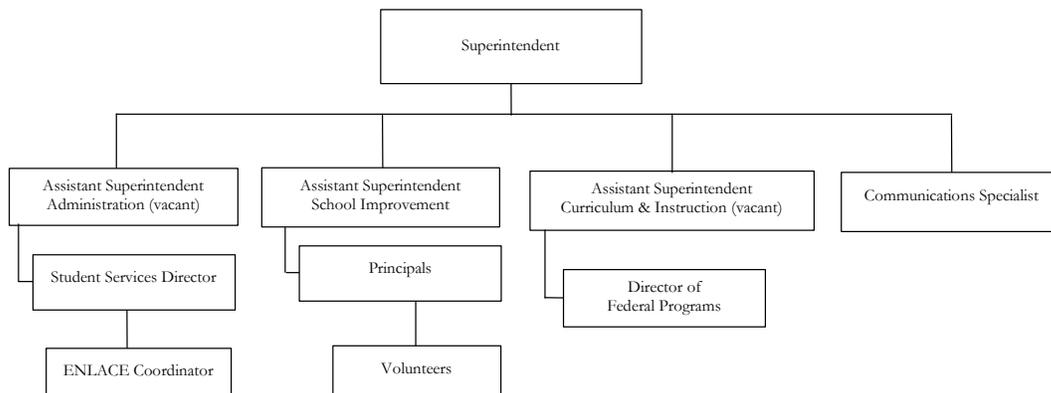
- The community expecting and making it possible for every student to graduate.
- Numerous opportunities existing for students at all levels to interact with and learn from community leaders and volunteers.
- The community understanding the importance of and providing the resources to produce world class schools.
- The community and district actively working together to share information and expectations.

Community-related “values” stress that the family is the foundation of learning; a supportive home environment encourages learning; a strong work ethic fosters community prosperity and growth; and a well-educated population is vital to realizing a productive community in the future.

The “mission” stresses the importance of educating students to “become contributing members of society.” Several strategic goals also focus on the importance of interaction between school and community. They emphasize the following:

- Campuses and facilities that are organized as centers of community collaboration and learning, efficiently meeting student and community needs and expectations (goal #3);
- A student body that exhibits pride in school and is fully engaged in school and community; and (goal #5); and

**EXHIBIT A-73
COMMUNITY INVOLVEMENT ORGANIZATION**



SOURCE: VISD, organizational charts and interviews with staff, April 2004.

- effective, open dialogue between the district and the community (goal #7).

The district improvement plan also addresses community involvement in specific action plans focused on expanding family literacy with childcare centers, parent academies, and working with teen parents; increasing daily attendance; providing outreach services for social problems; and enhancing communication efforts with both internal and external populations.

PARENTAL INVOLVEMENT

Around the country, school districts are paying close attention to a groundswell of parental interest and involvement in their schools. The Southwest Educational Development Laboratory (SEDL), in a 2002 review of 51 research studies, confirmed that “when schools, families, and community groups work together to support learning, children tend to be more successful in school, stay in school longer, and like school more.” They also found that this relationship holds true for families of all economic, racial/ethnic, and educational backgrounds, and for students of all ages.

Federal, state, and local laws spell out high expectations for parental involvement in public education. For example, the Texas Education Agency’s (TEA) Parent Involvement and Community Empowerment Initiative supports the policy directives of the Texas Legislature and the State Board of Education. The No Child Left Behind Act of 2002, the primary federal education law, also requires parent involvement activities. In addition, the 1995 revision of the Texas Education Code (TEC) strongly emphasizes the importance of parent involvement, stating that “a successful public education system is directly related to a strong, dedicated, and supportive family and that parental involvement in the school is essential for the maximum educational achievement of a child.” Specifically, Section 4.001(b) states “parents will be full partners with educators in the education of their children.” This is amplified in Section 26.001(a), which states “parents are partners with educators, administrators, and school district boards of trustees in their children’s education. Parents shall be encouraged to actively participate in creating and implementing educational programs for their children.”

Section 1118 of the No Child Left Behind (NCLB) legislation requires that districts receiving federal funding require each school to hold an annual parent meeting at a convenient time to inform parents of the importance of parental involvement and to share the district policy. VISD has developed and distributed its policy and compact, which describes

how the district and each campus will attempt to build parental involvement in order to ensure improved student achievement. Essentially, the policy describes campus goals to involve parents in organized, timely activities that will contribute to overall student improvement. It further suggests ways for involving community-based organizations and businesses in parent involvement activities and spells out specific strategies to increase parental involvement. The compact, which requires signatures, spells out the responsibilities of schools, parents, and students and is printed in both English and Spanish.

VISD offers a number of programs and special services designed to involve parents in the educational lives of their children. Most are coordinated through the director of Federal Programs office and include the following:

- Parent liaisons, who are either certified teachers or social workers, link the school and home. Some of their responsibilities consist of monitoring student attendance, conducting home visits, and providing parent training seminars and workshops. One of their annual events, the Parent Expo, is a one-night program to help parents learn about the school and community services available to enhance their children’s educational experience. Parent liaisons also make referrals to community organizations and agencies and work with area homework clubs. A nine-session Parent Academy is designed to help parents help their children improve their learning in math, science, and reading. Participants have an opportunity to talk with other parents, share experiences, and learn parenting skills. The year-long program ends with a “graduation” and a tour of Victoria College. Parent liaisons are funded by Title I, Title IV & Title V, which total \$581,291.
- The Parents as Teachers Program involves parent educators visiting families with very young children up to the age of three and providing them with age-appropriate literacy activities. Additional activities include bringing together these parents and children monthly for family meetings and play groups at the Family Connection Center or the Profit Family Services Center.
- The Even Start family literacy program combines childhood education, parenting education, training in English as a Second Language (ESL), and a General Equivalency Diploma (GED) at no cost to any eligible VISD resident who has a child seven years of age or younger.

- The Parent Place, located at the Family Connection Center, supplies parents with games, ideas, and resources for activities that will help children do better in school.
- Twelve schools in VISD offer the Pre-K Connection Program, which provides four-year olds with an educational foundation in language and literacy skills to prepare them for later reading success.
- KIDZConnection identifies students and families who are living with another family for financial reasons; have been evicted; are staying in a motel, shelter, car, or on the streets; or are moving from place to place. Staff works with agencies, businesses, and foundations to encourage these students to stay in school. KIDZConnection coordinates homework centers for these students as well.

- Profit Family Services provide academic and parenting instruction for teen parents; family literacy instruction; child development services for secondary students and former dropouts; and opportunities for young children with disabilities to interact with other children.

Exhibit A-74 shows the budget allocations for these programs.

The Federal Programs office also maintains a list of Victoria area resources for referrals as appropriate. This list includes sources for help with literacy, family and protective services, child care, health and medical services, housing, transportation, legal assistance, and workforce assistance, among others.

**EXHIBIT A-74
FEDERAL PROGRAM BUDGETS
FAMILY INVOLVEMENT PROGRAMS
2003-04**

PROGRAM	DESCRIPTION	BUDGET
Family Connection	Covers cost of parent educators, much of Even Start, a social worker, a language/literacy specialist, staff for Parent Place; childcare workers, and Profit Family Services (largely funded by Title I, Part A)	\$330,224
KIDZConnection	Supports district homeless students and Homework Centers (Title I, Part A—\$83,000; McKinney-Ventro Grant—\$120,000)	\$203,000
Even Start	Provides adult GED and parenting classes as well as early childhood education for their children	\$200,000
Pre-K Connection	Prepares preschool children for kindergarten by covering the cost of staff and providing staff development for preschool teachers (Title I, Part A—\$416,000; Texas Early Head Start Component Grant—\$180,000)	\$596,000
Parent Connection	Covers costs of several parent liaisons, who work with families on attendance, parent training, and referrals (Title I, Part A)	\$122,844

SOURCE: VISD, Federal Programs, April-May 2004.

**CHAPTER 8
PURCHASING**

Efficient purchasing and warehousing requires management processes that ensure supplies, equipment, and services vital to the school’s mission are purchased from a competitive source, in the right quantity, delivered to the correct location in a timely manner, and are stored in a secure location. These criteria should be met for each purchase without sacrificing quality.

In 1995, the Texas Education Code (TEC) was revised to expand school district purchasing options by adding three new methods of competitive procurement: design-build contracts, competitive sealed proposals, and request for proposals for personal property and construction contracts.

In 1997, the Texas Legislature included two additional methods: job order contracts and contracts using construction managers. In 2001, the legislature added yet another method of competitive procurement, the reverse auction procedure. With these additions, school districts can select among nine methods to satisfy competitive purchasing requirements for goods valued at \$25,000 or more, or multiple like items with a cumulative value of more than \$25,000 in a 12-month period (**Exhibit A-75**). For purchases valued between \$10,000 and \$25,000, school districts are required to obtain written and sealed quotations from at least three suppliers.

In 1999, the Office of the Attorney General issued an opinion (Op. JC-37) stating that school district procurement through an interlocal agreement or a cooperative purchasing arrangement satisfies competitive bidding requirements. Under an interlocal agreement, a district can contract or agree with another local government, including a nonprofit corporation that is created and operated to provide one or more governmental services and to purchase goods and services reasonably required for the installation, operation, or maintenance of the goods.

In accordance with TEC section 44.041, school districts must advertise bids for purchases worth \$25,000 or more at least once a week for two weeks in any newspaper published in the county in which the district is located. Those between \$10,000 and \$25,000 must be advertised in two successive issues of any newspaper in the district’s county. The TEC requires advertisements to specify the categories of property the district will purchase and solicit vendors who are interested in supplying them.

Exceptions to competitive bidding requirements include contracts for professional services, including architect fees, attorney fees, and fees for fiscal agents. The TEC also allows a district to purchase items that are available from only one source (“sole-source” purchases) if certain criteria are met, including the following:

- An item for which competition is precluded because of the existence of a patent, copyright, secret process, or monopoly;

**EXHIBIT A-75
COMPETITIVE PROCUREMENT METHODS**

PURCHASING METHODS	METHOD DESCRIPTION
Competitive bidding	Requires that bids be evaluated and awarded based solely upon bid specifications, terms and conditions contained in the request for bids, bid prices offered by suppliers, and pertinent factors affecting contract performance. Forbids negotiation of prices of goods and services after the proposal opening.
Competitive sealed proposals	Requires the same terms and conditions as competitive bidding, but allows changes in the nature of a proposal and prices after the proposal opening.
Request for proposals	Generates competitive sealed proposals and involves several key elements, including newspaper advertisement, notice to proposers, standard terms and conditions, special terms and conditions, a scope-of-work statement, an acknowledgment form/response sheet, a felony conviction notice, and a contract clause.
Catalog purchase	Provides an alternative to other procurement methods for the acquisition of computer equipment, software, and services only.
Interlocal contract	Provides a mechanism for agreements with other local governments, the state or a state agency to perform governmental functions and services.
Design/build contract	Outlines a method of project delivery in which the school district contracts with a single entity for both the design and construction of a project. (The “single entity” is usually a team of firms including a general contractor, architect, and sometimes an engineer. One firm rarely does both the design and the construction.)
Job order contracts	Provides for the use of a particular type of contract for jobs (manual labor work) for minor repairs and alterations.
Construction management contracts	Outlines the use of a contract to construct, rehabilitate, alter or repair facilities using a professional construction manager.
Reverse auction procedure	Outlines a bidding process that involves submission of bids by multiple suppliers, unknown to each other, in a manner that allows the suppliers to bid against each other.

SOURCE: Texas Education Agency’s Financial Accountability System Resource Guide (FASRG), 2000 and Legislative Briefing Book, 2001.

- A film, manuscript, or book;
- A utility service including electricity, gas, or water; or
- A replacement part or component for equipment that is specific to a particular piece of equipment and not available from more than one vendor.

To properly use the sole-source arrangement, a school district is responsible for obtaining and retaining documentation from the vendor that clearly states the reasons the purchase requires a sole-source. Sole-source exceptions do not apply to mainframe data processing equipment and peripheral attachments with a single item purchase price of more than \$15,000.

Computer hardware and software can be purchased several ways in accordance with TEA regulations:

- District-wide bids for computer hardware, software, and printer needs. Vendors can be contacted directly by school and department personnel for pricing and technical guidance;
- Purchases made through the Texas Department of Information Resources (DIR). Schools and districts can purchase a variety of software on DIR’s website at competitive prices; and
- Purchases made through the Texas Building and Procurement Commission (TBPC) -Qualified Information Systems Vendors (QISV) catalog purchases. The QISV Purchasing Program uses methods such as rotating qualified vendors and limiting proprietary specifications to allow schools to purchase products and services in a cost effective and efficient manner. Purchases of computers, software, technology services, and peripherals not available through a district bid are made through QISV catalog solicitations.

The VISD's policies and procedures set forth dollar limitations and approval levels for purchases.

Exhibit A-76 shows purchasing thresholds and requirements.

VISD uses many interlocal agreements and cooperative purchasing arrangements to procure goods and services. The district maintains agreements with Regional Education Service Center III, Regional Education Service Center IV, the Texas Local Government Statewide Purchasing Cooperative, the City of Victoria, and the County of Victoria. As part of the review, the review team

**EXHIBIT A-76
VISD PURCHASING THRESHOLDS
AND REQUIREMENTS
MAY 2004**

PURCHASE LEVELS	PURCHASE REQUIREMENTS
\$25,000 and more	Formal sealed bid
\$10,000 to \$24,999	Formal quotations from at least three vendors (written and sealed)
\$2,000 to \$9,999	Quotations from at least three vendors (Fax or written)
\$500 to \$1,999	Quotations from at least three vendors (telephone)

SOURCE: VISD Purchasing and Acquisition Policy, May 2004.

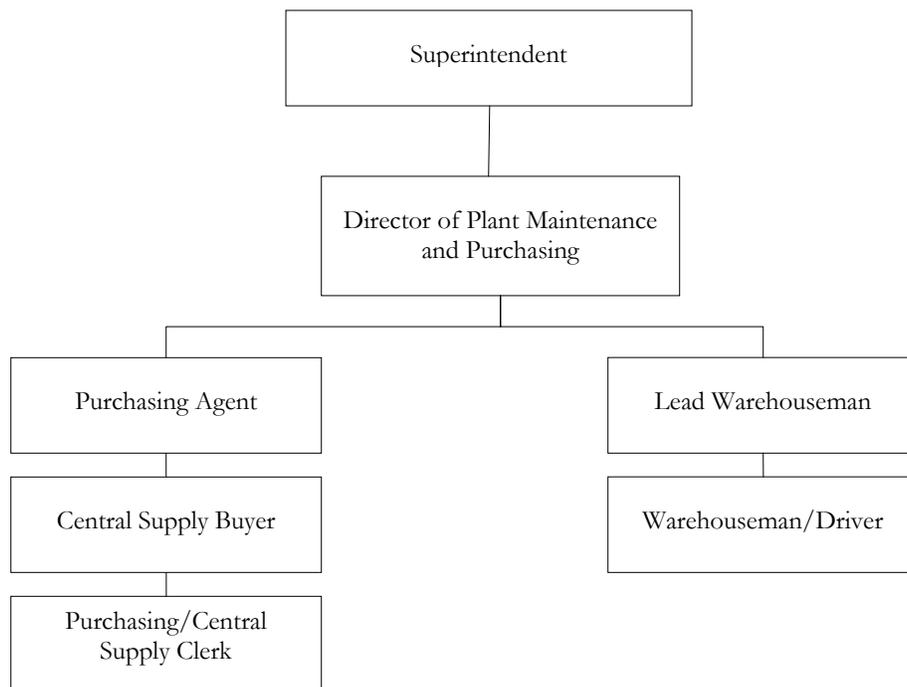
looked at a sample of invoices, contracts, bid folders, and transactions with vendors to assess VISD’s purchasing processes and procedures.

VISD’s Purchasing, Warehouse, and Plant Maintenance departments all report to the director of Plant Maintenance and Purchasing. The director reports to the superintendent. **Exhibit A-77** shows the current Purchasing and Warehouse organization. The Purchasing agent oversees the day-to-day operations of district Purchasing functions and is supported by a Central Supply buyer and a Purchasing/Central Supply clerk. The lead warehouseman manages the Central Warehouse with one warehouseman. The Warehouse Department also uses one part-time student.

VISD Purchasing Department’s goals and objectives are as follows:

- to obtain the most value for each dollar spent;
- to buy the right material or service, with the right quality, in the proper quantity, at the right time, and from the proper source;
- to ensure suppliers deliver the right item(s);
- to ensure fair treatment of suppliers (fair and open competition);
- to avoid purchasing pitfall by using experience in the preparation of specifications and item descriptions;
- to provide all interested persons with information about the district's purchasing policies, and the methods used to evaluate and award bids; and
- to ensure equal opportunity to all responsible bidders for district business.

**EXHIBIT A-77
VISD PURCHASING AND WAREHOUSE ORGANIZATION
2003-04**



SOURCE: VISD Purchasing Department, May 2004.

According to TEA’s Financial Accountability System Resource Guide (FASRG), every purchase within the district should be reviewed by the Purchasing Department to prevent violations of state and federal law and local school board policies.

WAREHOUSE AND PRINT SHOP OPERATIONS

An efficient Warehouse operation should ensure that all purchases and deliveries to schools and departments are complete and timely; inventory levels are sufficient to meet requests for supplies from individual schools and units; property and equipment are accounted for properly and controlled; and surplus or obsolete property is disposed of properly and removed from district records.

The VISD Central Supply Warehouse staff consists of a lead warehouseman and a warehouseman. The lead warehouseman is responsible for the day-to-day operations of the warehouse and reports to the director of Plant Maintenance and Purchasing. Central Supply Warehouse’s main responsibilities include delivery and receipt of central warehouse catalog items. Warehouse personnel also conduct a physical inventory of the warehouse twice a year.

VISD’s Central Supply Warehouse and Food Services Warehouse share a facility located at 2301 East Rio Grande. This facility also houses the district’s Technology Room, surplus furniture inventory, and archives. **Exhibit A-78** shows the square footage of different units within the warehouse.

**EXHIBIT A-78
WAREHOUSE SQUARE FOOTAGE
BY SECTION**

SECTION	SQUARE FEET
Freezer within Central Supply	4,656
Storage Facility	4,837
Archives	8,480
Print Shop	1,408
Child Nutrition Offices	1,320
MIS Tech Room	1,408
Food Services Warehouse	13,208
Furniture Storage Area	3,600
Total	38,917

SOURCE: Central Supply Warehouse Department, May 2004.

The warehouse makes deliveries no later than the day after receiving an order to each campus and department on an as-needed basis.

The district has two operations that are accounted for through its Central Supply internal service fund: the Central Supply Warehouse operations and the Print Shop operations. The purpose of an internal service fund is to account for activities that primarily provide services for the benefit of other departments. The VISD Central Supply Warehouse operation procures and provides goods for the district in addition to outside entities. The district has purchasing agreements with the city of Victoria and the county of Victoria for the purchase of food and supplies. These outside entities are billed monthly and charged the cost of the goods or services and a handling fee, or profit percentage. The handling fee ranges from 10 percent to 20 percent.

The district Print Shop is located in the warehouse. Staff consists of the Print Shop supervisor and two printing clerks who report to the chief financial officer. The Print Shop provides printing and copying services to departments and campuses. Services include color and black and white copying, printing, and laminating. The district uses outside vendors for more complex printing needs.

Exhibit A-79 shows a summary of sales for the two operations from 2001 to 2004.

CONTRACTING PROCESS

A contract is a legally enforceable agreement between two or more competent parties; it is mutually binding and obligates one party to furnish something of value and the other party to provide consideration. School districts need a contract management process that covers the areas of contract negotiation and contract compliance. The contract negotiation process ensures that contracts awarded to bidders are for the best available goods and services at the best prices with terms that are favorable to the district. The negotiation process should also ensure the proper evaluation of terms and conditions by district Finance or Purchasing staff, and that the school board members receive adequate information before voting to accept a contract.

After a contract is awarded, school districts need a process to evaluate the services rendered or products provided under the contract to ensure the execution of contract terms. The monitoring process ensures that the district has someone to represent it as a final authority for disputes that may arise. In addition, the monitoring process has a mechanism to evaluate a vendor's performance and provide feedback or initiate corrective action when warranted.

**EXHIBIT A-79
CENTRAL SUPPLY INTERNAL SERVICE
FUND SALES**

YEAR	PRINT SHOP	CENTRAL SUPPLY WAREHOUSE
2001	\$192,171	\$759,264
2002	\$170,693	\$819,410
2003	\$141,223	\$723,247
2004 (seven months)	\$122,352	\$458,601

SOURCE: VISD Business Office, May 2004.

**CHAPTER 9
FINANCIAL MANAGEMENT**

School districts must practice sound financial management in order to maximize the effectiveness of limited resources and to plan for future needs. Effective financial management ensures that internal controls are in place and operating as intended, that technology is maximized to increase productivity, and that timely reports help management reach its goals.

School district financial management involves the effective use of limited resources to support student achievement. School districts' financial operations must comply with federal, state, and local laws and regulations. The Texas Education Agency (TEA) requires districts' financial operations to comply with the guidelines of the Financial Accountability System Resource Guide (FASRG). The FASRG combines requirements for financial management from a variety of sources into one guide for Texas school districts.

The most current financial data available for all districts is current year budgetary reports through the Public Education Information Management System (PEIMS) administered by TEA. PEIMS budget reports provide beginning of the year budget data and include the General Fund, Food Service Fund, and Debt Service Fund. All other funds are specifically excluded because they are not legally required to have an officially adopted budget. For comparison of actual revenues and expenditures, the most current information available for all districts is 2002–03. PEIMS information includes the audited financial data for all funds in each district.

One way to judge the effectiveness of a district's financial management function is to compare the district with peer districts. VISD selected Bryan, Lamar Consolidated, Tyler, and Wichita Falls as its peer districts. **Exhibit A-80** presents student enrollment, percentage of economically disadvantaged students, property value, property

value per student, and total tax rate for VISD, its peer districts, and the state.

Texas school districts receive revenue from three primary sources: local, state, and federal. Property taxes provide the primary local source of funds for most school districts. School districts develop and adopt their tax rate while county appraisal districts appraise the value of property within the district. The combined rate is applied to the assessed property value to compute the district's total tax levy. Property values are important determinates of school funding at the state and local level. There is an inverse relationship between local property wealth and state aid: the greater the property wealth of the district, the greater the amount of revenue raised locally, but the lower the amount of state aid.

VISD receives funding from the state based on a formula approved by the legislature. In general, the funding is based on the number of students in average daily attendance in the district. The funding formula also contains additional funding for programs designed to benefit students with special needs.

VISD also receives state funding from the Instructional Facilities Allotment (IFA) and Existing Debt Allotment (EDA) to pay a portion of the payments on its bonded indebtedness for facilities. The IFA is a state program to assist property-poor school districts with facility upgrades and acquisition. The EDA is a state program that pays a portion of district's bonded indebtedness based on the local tax effort. The district's IFA and EDA funding was equivalent to 37.8 percent of the annual principal and interest payment for its bonded debt in 2002–03.

VISD receives federal funding from the U.S. Department of Education both directly and through TEA and other agencies to assist in providing educational, social, and vocational opportunities for VISD children. The district also receives funding from the U.S. Department of Agriculture to assist in providing students with nutritious meals.

**EXHIBIT A-80
COMPARISON OF ECONOMIC INDICATORS
VISD, PEERS AND STATE
2003-04**

DISTRICT	NUMBER OF STUDENTS ENROLLED	PERCENTAGE ECONOMICALLY DISADVANTAGED	PROPERTY VALUE PER STUDENT	TOTAL TAX RATE
Bryan	14,104	62.1%	\$195,424	\$1.68
Lamar	17,724	45.8%	\$240,698	\$1.66
Tyler	17,273	55.0%	\$276,799	\$1.47
Victoria	14,316	53.0%	\$212,031	\$1.55
Wichita Falls	15,035	50.9%	\$203,756	\$1.56
State	4,311,502	52.8%	*	\$1.55

SOURCE: Texas Education Agency, Public Education Information Management System (PEIMS) 2003-04; Comptroller's Office, 2003 Final Tax Rates.
* Information not available.

Exhibit A-81 presents a comparison of budgeted revenue for all funds by source for VISD, its peer districts, and the state on a per student basis. VISD has the lowest total revenue per student. All of the peer districts rely on local revenues for the majority of their budgeted revenues.

VISD's total revenues have increased by 12.6 percent from 1999-2000 through 2002-03. During this period, federal revenue increased 44.5 percent, more than any other revenue source. This increase is primarily due to the funding VISD received for the safe schools/healthy students program beginning in 2000-01 and continuing through 2002-03. Other local revenues have declined by 31.6 percent during this same period, primarily due to the decrease in interest earnings, from \$2.7 million in 1999-2000 to \$623,583 in 2002-03. The decrease is due at least in part to the progressive decline in interest rates over this same time period.

Exhibit A-82 compares revenues by source for 1999-2000 through 2003-04. The percentage change

is presented for the 1999-2000 through 2002-03 period since these are actual revenues reported to TEA and, as previously stated, budgets reported to TEA do not include all funds.

VISD levies property taxes composed of a maintenance and operations (M&O) component and an interest and sinking (I&S) component. The taxes collected from the M&O component are used to fund the general operations of the district and the taxes collected from the I&S component are used to pay the district's bonded indebtedness. **Exhibit A-83** presents the tax rates for VISD, the peer districts, and the state.

VISD's total tax rate increased by 5.3 percent from 1999-2000 through 2003-04. The M&O component increased by 5.7 percent during this period and was below the \$1.50 state imposed cap. **Exhibit A-84** shows the changes in the VISD tax rate from 1999-2000 through 2003-04.

**EXHIBIT A-81
BUDGETED REVENUE PER STUDENT
VISD, PEERS, AND STATE
2003-04**

	BRYAN	VICTORIA	WICHITA FALLS	TYLER	LAMAR	STATE
Enrolled Students	14,104	14,316	15,035	17,273	17,724	4,311,502
Local Revenues	\$3,658	\$3,462	\$3,441	\$4,300	\$4,248	\$3,972
State Revenues	\$3,002	\$2,500	\$2,673	\$1,676	\$2,767	\$2,834
Federal Revenues	\$19	\$256	\$314	\$259	\$242	\$256
Total Revenue	\$6,679	\$6,218	\$6,428	\$6,235	\$7,257	\$7,063

SOURCE: Texas Education Agency, PEIMS 2003-04.

* Totals may not add due to rounding

**EXHIBIT A-82
REVENUE - ALL FUNDS
VISD
1999-2000 THROUGH 2003-04**

REVENUE SOURCE	1999-2000 ACTUAL	2000-01 ACTUAL	2001-02 ACTUAL	2002-03 ACTUAL	PERCENT CHANGE 1999-2000 THROUGH 2002-03	2003-04 BUDGET
Local Tax Revenue	\$41,285,708	\$43,740,740	\$46,652,131	\$47,199,961	14.3%	\$46,815,580
Other Local Revenue	\$6,536,554	\$5,986,555	\$4,809,319	\$4,473,175	(31.6%)	\$2,750,335
State Revenue	\$38,177,931	\$37,173,583	\$38,602,637	\$41,672,227	9.2%	\$35,792,475
Federal Revenue	\$11,071,425	\$14,236,943	\$15,993,180	\$15,994,726	44.5%	\$3,660,183
Total Revenue	\$97,071,618	\$101,137,821	\$106,057,267	\$109,340,089	11.0%	\$89,018,573

SOURCE: Texas Education Agency, PEIMS 1999-2000 through 2003-04.

**EXHIBIT A-83
TAX RATE COMPARISON
VISD, PEER DISTRICTS AND STATE
2003-04**

	BRYAN	LAMAR	WICHITA FALLS	VICTORIA*	TYLER	STATE*
Maintenance and Operations	\$1.50	\$1.50	\$1.50	\$1.46	\$1.43	\$1.45
Interest and Sinking	\$0.18	\$0.16	\$0.06	\$0.10	\$0.04	\$0.11
Total Tax Rate	\$1.68	\$1.66	\$1.56	\$1.55	\$1.47	\$1.55

SOURCE: Comptroller's Office, 2003 Final Tax Rates.

* Totals do not add due to rounding.

EXHIBIT A-84
TAX RATE HISTORY
VISD

1999-2000 THROUGH 2003-04

	1999-2000	2000-01	2001-02	2002-03	2003-04	PERCENT CHANGE FROM 1999-2000
Maintenance and Operations	\$1.378	\$1.436	\$1.456	\$1.456	\$1.456	5.7%
Debt Service	\$0.098	\$0.093	\$0.095	\$0.098	\$0.098	0.0%
Total Tax Rate	\$1.476	\$1.529	\$1.551	\$1.554	\$1.554	5.3%

SOURCE: VISD, audited financial statement 2002-03; VISD tax rate resolution, August 2003.

VISD contracts with Victoria County to collect its taxes and pays the county 40 cents for each parcel shown on the district's tax roll. VISD entered into the initial contract in 1993. The district contracts with a law firm for the collection of delinquent taxes. The taxpayer pays the firm a 15 percent penalty of the taxes due as a fee for their services.

Exhibit A-85 shows the tax levy, current year levy collected, delinquent taxes collected, and penalty and interest collected for 1999-2000 through 2003-04. VISD has total tax collections ranging from 99.6 to 100.3 percent of the levy and has budgeted a 99.4 percent collection for 2003-04.

The FASRG requires school districts to account for expenditures by the type or object of the

expenditure. **Exhibit A-86** presents budgeted expenditure information as a percent of total expenditures for VISD, its peer districts, and the state by object code description for 2003-04. VISD budgets the largest percentage of its expenditures for payroll at 80%.

VISD expenditures for payroll have increased by 8.1 percent from 1999-2000 through 2002-03. While salaries and wages during this period have remained fairly flat, health insurance costs have increased by \$3.6 million. The state supplemental compensation for health insurance of \$2.2 million began in 2002-03. Contracted services have increased by 10.1 percent during this period mainly due to the increase in professional services such as guidance and counseling, social work, and community services.

EXHIBIT A-85
TAX INFORMATION
VISD

1999-2000 THROUGH 2003-04

	1999-2000 ACTUAL	2000-01 ACTUAL	2001-02 ACTUAL	2002-03 ACTUAL	PERCENT INCREASE 1999-2000 THROUGH 2002-03	2003-04 BUDGET
Tax Levy	\$41,441,182	\$43,699,970	\$46,531,922	\$47,216,232	13.9%	\$47,093,655
Current Taxes	\$40,123,933	\$42,512,571	\$45,324,533	\$45,871,180	14.3%	\$45,765,580
Delinquent Taxes	\$721,441	\$752,717	\$800,308	\$799,605	10.8%	\$700,000
Penalties and Interest	\$440,334	\$475,452	\$527,290	\$529,176	20.2%	\$350,000
Total Collections	\$41,285,708	\$43,740,740	\$46,652,131	\$47,199,961	14.3%	\$46,815,580
Percent of Total Collections to Levy	99.6%	100.1%	100.3%	100.0%		99.4%

SOURCE: VISD, audited financial statements for referenced years; VISD budget documents 2003-04.

EXHIBIT A-86
BUDGETED EXPENDITURES BY OBJECT
VISD, PEERS AND STATE
2003-04

OBJECT	BRYAN ISD	WICHITA FALLS ISD	LAMAR CISD	TYLER ISD	VICTORIA ISD	STATE
Payroll Costs	72.3%	73.4%	76.0%	79.4%	80.0%	73.0%
Contracted Services	6.4%	11.3%	7.8%	7.6%	5.9%	*
Supplies	7.8%	6.4%	6.8%	7.0%	5.9%	*
Other Operating	2.1%	2.0%	1.7%	1.9%	2.5%	16.4%
Debt Service	10.6%	5.1%	7.4%	3.8%	5.5%	9.3%
Capital Outlay	0.9%	1.7%	0.3%	0.3%	0.2%	1.4%
Total	100.1%	99.9%	100.0%	100.0%	100.0%	100.1%

SOURCE: Texas Education Agency, PEIMS 2003-04.

* The state expenditures for contracted services, supplies, and other operating are reported as other operating. Totals may not add to 100 due to rounding.

Supplies have increased 10.3 percent during this period primarily due to increases in instructional supplies, reading materials, and maintenance supplies. The 52.8 percent increase in other operating expenditures during this period stems from the district tracking expenditures resulting from hurricane losses in the other operating category. Debt service expenditures have not changed significantly during this period; however, the district refunded \$6.8 million in outstanding debt for a savings of \$368,500. The 85.7 percent decrease in capital outlay is due to the completion of the 1998 bond projects.

Exhibit A-87 compares expenditures by object for 1999–2000 through 2003–04. The percent change is presented for the 1999–2000 through 2002–03 period since these are actual expenditures reported to TEA and, as previously stated, budgets reported to TEA do not include all funds.

Chapter 1 of the FASRG also mandates the use of function codes by school districts to track expenditures for different school district operations. **Exhibit A-88** compares VISD’s budgeted expenditures per enrolled student by function code to its peer districts. These budgeted expenditures include payroll, contracted services, supplies, other

**EXHIBIT A-87
EXPENDITURES BY OBJECT
VISD
1999-2000 THROUGH 2003-04**

OBJECT NAME	1999-2000 ACTUAL	2000-01 ACTUAL	2001-02 ACTUAL	2002-03 ACTUAL	PERCENT CHANGE 1999-2000 THROUGH 2002-03	2003-04 BUDGET
Payroll	\$74,411,147	\$77,011,703	\$77,874,027	\$80,430,203	8.1%	\$72,022,747
Contracted Services	\$6,188,466	\$8,090,956	\$7,511,610	\$6,813,329	10.1%	\$5,274,356
Supplies	\$8,862,401	\$9,382,416	\$9,823,607	\$9,772,601	10.3%	\$5,294,455
Other Operating	\$2,477,252	\$2,226,276	\$2,475,495	\$3,784,192	52.8%	\$2,261,769
Debt service	\$4,978,423	\$4,805,836	\$11,743,152	\$4,860,270	(2.4%)	\$4,930,781
Capital Outlay	\$14,808,338	\$8,364,248	\$3,941,772	\$2,114,563	(85.7%)	\$198,319
Total	\$111,726,027	\$109,881,435	\$113,369,663	\$107,775,158	(4.0%)	\$89,982,427

SOURCE: Texas Education Agency, PEIMS 1999-2000 through 2003-04.

**EXHIBIT A-88
BUDGETED EXPENDITURES BY FUNCTION
VISD AND PEERS
2003-04**

FUNCTION (CODE)	TYLER ISD	VICTORIA ISD	WICHITA FALLS ISD	BRYAN ISD	LAMAR CISD
Enrolled Students	17,273	14,316	15,035	14,104	17,724
Instruction (11)	\$3,493	\$3,465	\$3,252	\$3,405	\$3,758
Instructional Resources and Media Services (12)	\$110	\$97	\$180	\$186	\$99
Curriculum and Staff Development (13)	\$67	\$55	\$73	\$21	\$68
Instructional Leadership (21)	\$94	\$90	\$100	\$138	\$54
School Leadership (23)	\$382	\$306	\$378	\$362	\$385
Guidance, Counseling and Evaluation Services (31)	\$228	\$241	\$198	\$211	\$193
Social Work Services (32)	\$22	\$22	\$30	\$29	\$14
Health Services (33)	\$72	\$48	\$63	\$71	\$77
Student Transportation (34)	\$131	\$120	\$145	\$237	\$235
Food Services (35)	\$327	\$347	\$359	\$416	\$424
Co-/Extracurricular Activities (36)	\$127	\$170	\$234	\$119	\$155
General Administration (41)	\$182	\$185	\$200	\$198	\$233
Plant Maintenance/Operations (51)	\$571	\$696	\$686	\$699	\$827
Security and monitoring services (52)	\$29	\$39	\$23	\$26	\$52
Data Processing Services (53)	\$63	\$53	\$46	\$77	\$73
Community Services (61)	\$10	\$4	\$0	\$4	\$6
Debt Service (71)	\$233	\$344	\$323	\$737	\$535
Facility Acquisition and Construction (81)	\$12	\$4	\$67	\$13	\$7
Payments - Shared Services (93)	\$1	\$0	\$0	\$0	\$0
Payments to JJAEP (95)	\$12	\$0	\$0	\$0	\$0
Payments to Tax Increment Funds (97)	\$17	\$0	\$8	\$16	\$0
Total	\$6,183	\$6,286	\$6,365	\$6,965	\$7,195

SOURCE: Texas Education Agency, PEIMS 2003-04.
*Totals may not add due to rounding.

operating, debt service, and capital outlay object codes. VISD budgeted the second lowest expenditures per student of the peer districts.

Exhibit A-89 presents the number of students and expenditures per student for 1999–2000 through 2003–04. The percent change is presented for the 1999–2000 through 2002–03 period since these are actual expenditures reported to TEA and, as previously stated, budgets reported to TEA do not include all funds. While the number of students and total expenditures per student decreased slightly from 1999–2000 through 2002–03, a number of functions have changed by more than 25 percent.

The guidance and counseling function and the social work function have both increased due to the district's receipt of the U. S. Department of Education Safe Schools/Healthy Students grant. The district received the grant award in 1999–2000 and has received approximately \$2 million in additional funding each year since 2000–01. The majority of the 57 percent increase in transportation costs is due to a \$402,853 increase in health insurance costs, purchase of buses for \$128,160, and the state supplement for health insurance of \$86,830 in 2002–03.

Data processing services costs increased due to increased wages, health insurance costs, supplies, and capital outlay expenditures over the period. The increase in the community services function is

primarily due to the funds expended in the Telecommunications Infrastructure Fund. The 89.5 percent decrease in facility acquisition and construction is due to the completion of the 1997–98 bond project. Payments to member districts in the shared services agreement for the Regional Day School for the Deaf represent increased participation by member districts.

VISD budgets 55.1 percent of its total expenditures for instruction, as compared to the state average of 50.4 percent. The functional expenditures presented in **Exhibit A-90** include payroll costs, professional and contracted services, supplies and materials, and other operating costs object codes. The other expenditures line item includes the debt services and capital outlay object codes and any other functional code not listed in the table to equal total expenditures.

Exhibit A-91 presents a comparison of operating expenditures between VISD and the state. Operating expenditures include payroll costs, professional and contracted services, supplies and materials, and other operating costs object codes for the functions listed. In this comparison, VISD budgeted 58.5 percent of its operating expenditures for instruction, as compared to the state average of 56.6 percent.

EXHIBIT A-89
VISD EXPENDITURES PER STUDENT
1999–2000 THROUGH 2003–04

FUNCTION (CODE)	1999–2000 ACTUAL	2000–01 ACTUAL	2001–02 ACTUAL	2002–03 ACTUAL	PERCENT CHANGE 1999–2000 THROUGH 2002–03	2003–04 BUDGET
Students	14,657	14,411	14,360	14,438	(1.5%)	14,316
Instruction (11)	\$3,772	\$3,933	\$4,002	\$3,995	5.9%	\$3,465
Instructional Resources and Media Services (12)	\$87	\$91	\$90	\$92	5.7%	\$97
Curriculum and Staff Development (13)	\$108	\$109	\$118	\$114	5.6%	\$55
Instructional Leadership (21)	\$117	\$127	\$141	\$138	17.9%	\$90
School Leadership (23)	\$289	\$306	\$310	\$312	8.0%	\$306
Guidance and Counseling Services (31)	\$246	\$301	\$306	\$335	36.2%	\$241
Social Work Services (32)	\$77	\$142	\$146	\$147	90.9%	\$22
Health Services (33)	\$40	\$44	\$46	\$49	22.5%	\$48
Student Transportation (34)	\$107	\$148	\$127	\$168	57.0%	\$120
Food Services (35)	\$324	\$328	\$318	\$353	9.0%	\$347
Co-/Extracurricular Activities (36)	\$182	\$172	\$164	\$168	(7.7%)	\$170
General Administration (41)	\$162	\$184	\$180	\$190	17.3%	\$185
Plant Maintenance/Operations (51)	\$693	\$710	\$706	\$771	11.3%	\$696
Security and monitoring services (52)	\$36	\$38	\$40	\$42	16.5%	\$39
Data Processing Services (53)	\$63	\$85	\$82	\$79	25.4%	\$53
Community Services (61)	\$20	\$29	\$31	\$57	185.0%	\$4
Debt Service (71)	\$340	\$333	\$818	\$337	(0.9%)	\$344
Facility Acquisition & Construction (81)	\$951	\$530	\$254	\$100	(89.5%)	\$4
Payments - Shared Services (93)	\$11	\$15	\$16	\$17	54.5%	\$0
Total Expenditures	\$7,623	\$7,625	\$7,895	\$7,465	(2.1%)	\$6,285

SOURCE: Texas Education Agency, PEIMS 1999–2000 through 2003–04.

*Totals may not add due to rounding.

**EXHIBIT A-90
TOTAL BUDGETED EXPENDITURES
VISD AND STATE
2003-04**

FUNCTION (CODE)	VISD		STATE	
	BUDGET	PERCENT OF BUDGET	BUDGET	PERCENT OF BUDGET
Instruction (11, 95)	\$49,600,972	55.1%	\$15,589,243,761	50.4%
Instructional Resources & Media Services (12)	\$1,382,043	1.5%	\$510,081,260	1.6%
Curriculum and Staff Development (13)	\$782,596	0.9%	\$298,010,337	1.0%
Instructional Leadership (21)	\$1,286,676	1.4%	\$361,760,097	1.2%
School Leadership (23)	\$4,383,181	4.9%	\$1,650,512,661	5.3%
Guidance and Counseling Services (31)	\$3,447,920	3.8%	\$905,954,996	2.9%
Social Work Services (32)	\$316,223	0.4%	\$60,895,504	0.2%
Health Services (33)	\$682,307	0.8%	\$275,916,155	0.9%
Student Transportation (34)	\$1,716,107	1.9%	\$809,760,319	2.6%
Food Services (35)	\$4,961,676	5.5%	\$1,564,346,444	5.1%
Co-/Extracurricular Activities (36)	\$2,424,704	2.7%	\$708,421,970	2.3%
General Administration (41, 92)	\$2,643,627	2.9%	\$1,123,457,628	3.6%
Plant Maintenance/Operations (51)	\$9,853,462	11.0%	\$3,103,620,563	10.0%
Security and monitoring services (52)	\$554,079	0.6%	\$200,272,092	0.6%
Data Processing Services (53)	\$759,481	0.8%	\$367,534,823	1.2%
Other Expenditures	\$5,187,373	5.8%	\$3,399,134,362	11.0%
Total Budgeted Expenditures	\$89,982,427	100.0%	\$30,928,922,972	99.9%

SOURCE: Texas Education Agency, PEIMS 2003-04.
*Totals may not add due to rounding.

**EXHIBIT A-91
VISD AND STATE
BUDGETED OPERATING EXPENDITURES
2003-04**

FUNCTION (CODE)	VISD		STATE	
	BUDGET	PERCENT OF BUDGET	BUDGET	PERCENT OF BUDGET
Instruction (11, 95)	\$49,600,972	58.5%	\$15,589,243,761	56.6%
Instructional Resources & Media Services (12)	\$1,382,043	1.6%	\$510,081,260	1.9%
Curriculum and Staff Development (13)	\$782,596	0.9%	\$298,010,337	1.1%
Instructional Leadership (21)	\$1,286,676	1.5%	\$361,760,097	1.3%
School Leadership (23)	\$4,383,181	5.2%	\$1,650,512,661	6.0%
Guidance and Counseling Services (31)	\$3,447,920	4.1%	\$905,954,996	3.3%
Social Work Services (32)	\$316,223	0.4%	\$60,895,504	0.2%
Health Services (33)	\$682,307	0.8%	\$275,916,155	1.0%
Student Transportation (34)	\$1,716,107	2.0%	\$809,760,319	2.9%
Food Services (35)	\$4,961,676	5.9%	\$1,564,346,444	5.7%
Co-/Extracurricular Activities (36)	\$2,424,704	2.9%	\$708,421,970	2.6%
General Administration (41, 92)	\$2,643,627	3.1%	\$1,123,457,628	4.1%
Plant Maintenance/Operations (51)	\$9,853,462	11.6%	\$3,103,620,563	11.3%
Security and monitoring services (52)	\$554,079	0.7%	\$200,272,092	0.7%
Data Processing Services (53)	\$759,481	0.9%	\$367,534,823	1.3%
Total Operating Expenditures	\$84,795,054	100.1%	\$27,529,788,610	100.0%

SOURCE: Texas Education Agency, PEIMS 2003-04.

ORGANIZATION, MANAGEMENT AND STAFFING

Financial management is most effective when a district properly aligns its business services functions, establishes strong systems of internal control, and properly allocates staff resources. The chief financial officer (CFO) reports directly to the superintendent and is responsible for financial management in VISD. The CFO is supported by 11 positions responsible for financial functions. The job descriptions accurately reflect the duties described by

the incumbents. The CFO is also responsible for the Print Shop, district mail, and the district receptionist.

The major financial duties of the CFO include serving as the chief financial advisor to the superintendent and board; ensuring compliance of the district's accounting system with laws, rules, and regulations; preparing the annual operating budget and all amendments to the budget; preparing and publishing the comprehensive annual financial report; and overseeing the operations and budget of

the business office. **Exhibit A-92** presents the organization of the central business office.

In addition to answering incoming calls, taking and routing messages, preparing correspondence, and copying documents for the department, the secretary has a number of bookkeeping responsibilities. The district accountant assists the CFO in the administration of the district's business affairs and oversees the work of the senior bookkeeper and two accounts payable clerks. The senior bookkeeper performs general bookkeeping and processes travel payments for the district. The accounts payable clerks process prompt and accurate payments for all non-payroll expenditures of the district. The accountant for special programs manages the financial operations of special revenue funds and performs internal audits on the district's school activity funds. The Payroll supervisor oversees the work of the four clerks and acts as the privacy officer for the district, as required by Public Law 104-191, the Health Insurance Portability and Accountability Act of 1996 (HIPAA). This position is also responsible for overseeing the district's employee benefit programs, with the exception of workers' compensation. The senior Payroll clerk is responsible for coordinating and preparing payrolls; receiving, auditing, and entering information from employee time reports; reconciling employee deductions registers and related billings; preparing and submitting quarterly and annual reports to federal and state agencies; and posting all payroll deduction

changes, terminations, and salary changes to the system. The three payroll clerks assist in preparing payrolls and leave reports; balancing retirement and annuity deductions; establishing direct deposit for employees; and signing accounts payable checks.

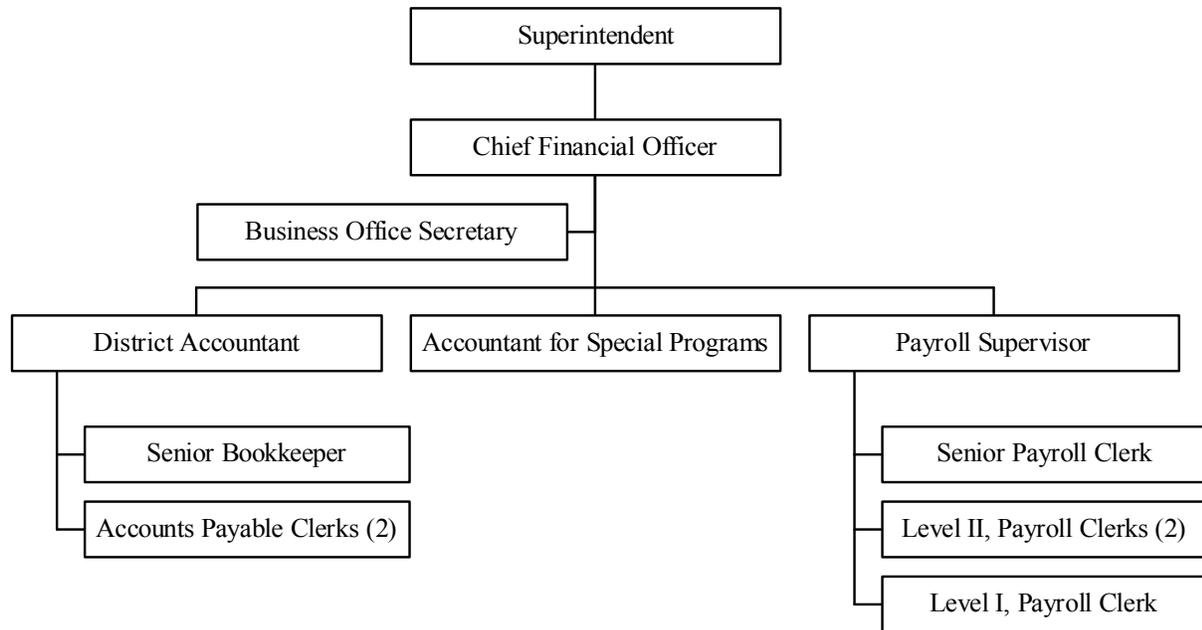
FINANCIAL PERFORMANCE

The 2001 Legislature enacted S.B. 218, which requires the implementation of a financial accountability rating system. In compliance with this mandate, TEA established the School Financial Integrity Rating System of Texas (School FIRST). The School FIRST rating system begins a transitional implementation for 2002-03 with preliminary and final paper reports to each district and its regional education service center. Upon full implementation of the rating system in 2003-04, the Board of Trustees began publishing an annual report describing the financial management performance of the district.

VISD received a superior achievement rating on the 2003 School FIRST accountability program. VISD was rated favorably on 19 of the 21 criteria in the system. The district's staffing ratios were outside the state guidelines for the ratio of students-to-total staff, and the district's fund balance exceeded the optimum fund balance calculation by more than 150 percent.

During the fiscal year ended August 31, 2002, VISD adopted the reporting model mandated by Statement No. 34, "Basic Financial Statements and

**EXHIBIT A-92
CENTRAL BUSINESS OFFICE ORGANIZATION
APRIL 2004**



SOURCE: VISD, Job Descriptions, April 2004.

Management's Discussion and Analysis for State and Local Governments," of the Governmental Accounting Standards Board (GASB 34). Under this new basis of reporting, capital assets are subject to depreciation. Under the previous reporting model, fixed capital assets were reported at cost without depreciation. Also, the concept and terminology of "fund balance" has been superseded by the concept of "net assets."

The difference between the district's assets and liabilities is its net assets. The three components of net assets are invested in capital assets' net of related debt, restricted net assets, and unrestricted net assets. Invested in capital assets includes all capital assets' net of accumulated depreciation reduced by outstanding balances of debt relating to the acquisition, construction, or improvement of these assets. Restricted assets are those on which creditors, grantors, contributors, and laws and regulations have placed limitations. Unrestricted net assets are all other net assets not included in the other two categories. The district's total net assets increased more than 10 percent from 2001–02 to 2002–03 and represent more than 50 percent of the district's total assets at August 31, 2003. The district's unrestricted net assets increased by more than 5 percent.

The district produces monthly financial reports for presentation to the board that include budget, actual, and fund balance information for the general, debt service, capital project, and debt service funds. Revenue information is presented by source, and expenditure information is presented by function. The reports also include other sources and uses of funds and are formatted like the annual financial reports required by TEA.

PLANNING AND BUDGETING

Budget preparation and administration are important aspects of overall district operations. Providing adequate resources for programs within the restraints of available funding sources presents administrators with a significant challenge. Sound budgeting practices benefit the district by:

- Establishing a documented method for budget development, adoption, and administration;
- Providing administrative controls for expenditure of funds within approved allocations; and
- Assuring campus and community involvement through a "bottom-up" budget approach.

VISD has a well-defined and communicated budget process. The district establishes a budget calendar that is disseminated to the board and district administrators. The calendar begins in January with

the preparation of the projected student enrollment for the next budget year and ends in August with the adoption of the budget and the tax rates to support the budget. Budget packets are distributed to the schools and departments in February and returned to the central business office in early April.

Schools' budgets are based on a per pupil allocation for each grade level. Personnel units are assigned to each campus based on established ratios. The schools have flexibility in the use of the funds and personnel units. The principals report that their site-based decision-making committee is involved in the budget process and that the campus improvement plan is tied to the budget they develop.

The budget packet includes forms for the school or department to request additional funds and personnel. These are reviewed by the budget committee and approved or denied based on funds availability and need.

The board study sessions begin in June and continue through the summer as the budget is developed. The administration presents the budgets for the general, food service, capital project, and debt service funds to the board for approval. During the budget workshops, the board is presented with a variety of information, including comparative salary information, tax collection rates, proposed salary schedules and increases, and budgeted and actual financial information for the current year. Revenue budgets are presented based on tax values, state revenue, and federal revenue. All of the board study sessions are open to the public, and the district holds the required public hearing on the budget before its adoption.

ACCOUNTING

Managing accounting is among the most important duties of a school district. Although regulations such as the FASRG and other accounting standards exist, actual practices vary widely throughout the state. A sound accounting and payroll system can provide numerous benefits, including internal controls and safeguards, timely reporting on the status of funds, and systematic disbursements to maximize available funds.

Accounting and payroll policies, procedures, and operations must be evaluated. Key areas include segregation of duties, integration of funds into the central accounting system, use of hardware and software systems, and staff training programs to keep employees abreast of constantly changing requirements.

VISD uses Pentamation software to automate the district's accounting systems. The software is capable

of generating reports for the general ledger, subsidiary ledgers, and budget-to-actual expenditure reports. The budget-to-actual reports include expenditures, encumbrances, and budget balances. The information is available to all budget managers online, and the budget manager's are able to print reports for their area of responsibility.

EXTERNAL AUDIT

External audits provide a review of the district's compliance with established standards and practices. The external audit provides an annual financial and compliance report; an examination of the expenditure of federal funds; and a report to management on internal accounting controls.

The Texas Education Code (TEC) Section 44.008 requires school districts to undergo an annual external audit that is performed by a certified public accountant. The scope of the external audit is financial in nature and designed to provide reasonable assurance that the financial statements fairly represent the financial condition of the district. The current audit firm performed VISD's annual financial and compliance audit for 2003, 2002, and 2001. The audits cover the period between September 1 of the previous calendar year and August 31 of the next year. All of the audit reports stated that the financial statements were a fair representation of the district's financial condition and did not report any material weaknesses in internal controls.

The audit reports did not report any findings or questioned costs related to the district's expenditure of federal funds. The district expended federal funds in the amount of \$14.1, \$15.8, and \$15.7 million during 2000–01, 2001–02, and 2002–03, respectively.

The current audit firm also performed VISD's annual financial and compliance audits for 1994 through 2000.

INTERNAL AUDIT

An internal auditor can determine if money is spent appropriately and if it is used efficiently. The internal auditor coordinates the internal and often the external audit activities of the district and provides a direct communication link to the board.

Internal auditing is an independent appraisal function within the district that evaluates the efficiency and effectiveness of the district's operations and makes recommendations based on the evaluations to improve processes, policies, and procedures to enhance district operations. The internal audit function monitors compliance with laws, regulations, and policies for the district as well as provides special reports and analyses to the board and administration.

School districts with an internal audit function usually have a charter adopted by the board that details the general purpose and objective, authority, and responsibilities of the function. This charter generally references the Institute of Internal Auditors, Inc. Standards for the Professional Practice of Internal Auditing and the Code of Ethics to ensure the internal audit function is appropriately performed. These standards and the code of ethics can be used as part of the evaluation for the function. The internal auditor is generally responsible for the following:

- Reviewing the operations of the district to ensure efficient use of resources;
- Reviewing the safeguards in place to protect district assets;
- Reviewing the district's activity funds at the schools;
- Conducting special reviews requested by the board or administration;
- Evaluating compliance with laws, rules, regulations, and policies;
- Planning and executing the internal audit schedule based on risk assessments; and
- Acting as the liaison for the external auditor and coordinating audit activities within the district.

VISD's accountant for special programs audits the district's activity funds annually. This position also acts as the district's liaison to the external auditor.

CHAPTER 10 TRANSPORTATION

The primary goal of every school district Transportation Department is to transport eligible students to and from school and approved extracurricular functions in a timely, safe, and efficient manner.

Chapter 34 of the Texas Education Code authorizes, but does not require, Texas school districts to provide transportation for students in the general population to and from home and school, school and career and technology training locations, and extracurricular activities. The federal Individuals with Disabilities Education Act (IDEA) requires that a school district provide transportation for students with disabilities if the district also provides transportation for students in the general population, or if students with disabilities require transportation to special education services.

Texas school districts are eligible for state reimbursement for transporting regular program, special program, and career and technology education (CATE) program students. The legislature sets funding rules and the Texas Education Agency (TEA) administers the program. TEA requires each eligible school district receiving state reimbursement to provide two annual school transportation reports, the School Transportation Route Services Report and the School Transportation Operations Cost Report. The Route Services Report documents miles traveled and number of riders by program and subprogram. The Operations Cost Report documents total miles, costs, and fleet data. The data used in this chapter for peer comparisons and trend analyses is derived from the 2002–03 TEA reports, the most recent year available.

State funding for regular program transportation is limited to transportation of students living two or more miles from the school they attend. The state does not reimburse districts for transporting students living within two miles of the school they attend unless hazardous walking conditions exist on the way to school, such as the need to cross a four-lane roadway without a traffic signal or crossing guard. The state reimburses districts for transporting students on hazardous routes within two miles of school, up to a maximum of 10 percent of the total annual reimbursement for transporting students living two or more miles away. A school district must use local funds to pay for transportation costs not covered by the state reimbursement.

For the regular program, the state reimburses districts qualifying for transportation expenses based on linear density, which is the ratio of the average number of regular program students transported

daily on standard routes to the number of route miles traveled daily for those standard routes. Standard route miles and riders are a subprogram of the regular program and do not include miles or riders for alternative, bilingual, desegregation, magnet, parenting, year-round or hazardous area service. TEA uses this ratio to assign each school district to one of seven linear density groups. Each group is eligible to receive a maximum per mile allotment.

Exhibit A–93 shows the linear density groups and the related allotment per mile.

Exhibit A–94 shows the linear densities and the resulting allotment for VISD and a peer group of school districts.

VISD received \$0.97 allotment per mile in 2002–03 based on the linear density for 2001–02. Standard regular miles of 506,808 and 462,600 riders during 2001–02 resulted in a linear density of 0.91 (linear density equals standard regular riders [462,600] ÷ standard regular miles [506,808]). Therefore, the district's reimbursement rate for each eligible regular program route mile for 2002–03 is \$0.97. Eligible route miles are measured from beginning to end at the last school served for home-to-school route service or first school served for school-to-home route service. Route miles eligible for reimbursement do not include extracurricular miles, deadhead miles (deadhead miles occur between the locations where the student transportation vehicle is parked during the day or night and the school where the eligible route miles begin and end), hazardous route miles in excess of the 10 percent limit, or other miles reported to TEA.

Exhibit A–95 compares total annual operations cost and the state allotment for regular program and special program transportation in 2002–03 for VISD and the peer districts as reported by TEA. The operations cost and state allotment for the regular program include regular program CATE route miles and private program miles. The operations cost and state allotment for the special program include special program CATE route miles and private program miles.

Exhibit A–96 shows the percentage of students transported compared to total enrollment at VISD and the peer districts.

Exhibit A–97 shows the annual riders, total annual route miles, and total buses for VISD compared to peer districts for 2002–03. Total annual riders are determined by multiplying average daily riders by 180 school days. Annual riders include CATE riders. Route miles occur while a bus is on a defined route transporting students. These miles are reported on

EXHIBIT A-93
LINEAR DENSITY GROUPS

LINEAR DENSITY GROUP	ALLOTMENT PER MILE
2.40 and above	\$1.43
1.65 to 2.40	\$1.25
1.15 to 1.65	\$1.11
0.90 to 1.15	\$0.97
0.65 to 0.90	\$0.88
0.40 to 0.65	\$0.79
Up to 0.40	\$0.68

SOURCE: Texas Education Agency, Handbook on School Transportation Allotments, revised May 2001.

EXHIBIT A-94
VISD AND PEER DISTRICTS
LINEAR DENSITY AND ALLOTMENT PER MILE

DISTRICT	STANDARD REGULAR RIDERS* 2002-03	STANDARD REGULAR MILES 2002-03	LINEAR DENSITY 2002-03	2002-03 ALLOTMENT PER MILE BASED ON 2001-02**	ELIGIBLE ALLOTMENT PER MILE 2003-04**
Bryan ISD	609,480	648,018	0.94	\$0.88	\$0.97
Lamar CISD	770,940	844,020	0.91	\$0.97	\$0.97
Tyler ISD	754,380	455,630	1.66	\$1.25	\$1.25
Wichita Falls ISD	364,320	311,856	1.17	\$0.97	\$1.11
Peer Average	624,780	564,881	1.17	\$1.02	\$0.97
Victoria ISD	475,020	527,040	0.90	\$0.97	\$0.97

SOURCE: Texas Education Agency, School Transportation Route Services Reports, 2002-03.

* Annual riders calculated by multiplying average daily riders by 180 school days.

** Allotment rates are based on the previous year's linear density.

EXHIBIT A-95
VISD AND PEER DISTRICTS STATE ALLOTMENT REGULAR AND SPECIAL PROGRAMS
2002-03

DISTRICT	REGULAR PROGRAM*			SPECIAL PROGRAM*		
	OPERATIONS COST**	STATE ALLOTMENT	PERCENT STATE	OPERATIONS COST**	STATE ALLOTMENT	PERCENT STATE
Bryan ISD	\$2,444,881	\$754,289	31%	\$713,165	\$322,869	45%
Lamar CISD	\$3,740,530	\$982,191	26%	\$849,017	\$358,282	42%
Tyler ISD	\$1,602,635	\$706,458	44%	\$839,287	\$313,837	37%
Wichita Falls ISD	\$2,046,052	\$376,085	18%	\$772,987	\$213,386	28%
Peer Average	\$2,458,525	\$704,756	30%	\$793,614	\$302,094	38%
Victoria ISD	\$1,946,819	\$696,459	36%	\$785,687	\$302,602	39%

SOURCE: Texas Education Agency, School Transportation Operations Cost Report and School Transportation Route Services Reports, 2002-03.

*Operations Cost and State Allotment include CATE routes.

**Operations cost excludes capital outlay and debt service and includes vehicle depreciation expense.

EXHIBIT A-96
VISD AND PEER DISTRICTS PERCENTAGE OF ENROLLED STUDENTS RIDING THE BUS
2002-03

DISTRICT	ENROLLMENT	AVERAGE DAILY RIDERS	PERCENT OF ENROLLED STUDENTS RIDING THE BUS
Bryan ISD	13,927	6,314	45%
Lamar CISD	16,923	9,590	57%
Tyler ISD	17,031	4,877	29%
Wichita Falls ISD	14,951	2,752	18%
Peer Average	15,708	5,883	37%
Victoria ISD	14,438	4,425	31%

SOURCE: Texas Education Agency, Public Education Information Management System (PEIMS), 2002-03; Texas Education Agency, School Transportation Route Services Report, 2002-03.

the TEA Operations Cost report and reflect actual route miles operated (with deadhead). The number of buses by program is reported on the TEA Operations Cost report.

Exhibit A-98 compares the transportation cost of the peer districts with VISD as a percentage of total district expenses. In 2002-03, transportation expenditures accounted for 2.5 percent of the district's total operating expenses, as compared to the peer district average of 2.7 percent.

Exhibit A-99 compares transportation cost efficiency for 2002-03 for VISD and the peer districts based on TEA data. Cost per mile is determined by dividing total annual operations cost less debt service and capital outlay by total annual odometer miles. Odometer miles are all miles driven, including miles for extracurricular trips, maintenance, and deadhead. VISD's costs per mile were below the peer average for both the regular program and the special program.

VISD's regular program transportation cost in 2002-03 was \$2.04 for each odometer mile. The district's special program transportation cost was \$2.49 per odometer mile. Reimbursement for special program transportation is not based on linear density. The per mile allotment rate for a special program is set by the Texas Legislature. All transportation for special program students, except certain extracurricular trips, is eligible for state reimbursement at \$1.08 each route mile.

The rider per route mile is determined by dividing total annual riders by total annual route miles including deadhead. Total annual riders are determined by multiplying average daily riders by 180 school days. The riders per bus are determined by dividing average daily riders by the total number of buses. The cost per rider is determined by multiplying route miles by cost per mile and then dividing by annual riders.

VISD's regular program cost per rider is \$2.95, as compared to the peer average of \$2.77. Only Wichita Falls cost per rider is higher at \$4.47. Wichita Falls' student transportation operations are outsourced to a private contractor. VISD's Transportation Department services a larger geographical area than its peers. VISD's geographical size may attribute to the higher cost per rider due to cost associated with deadhead miles and lower linear density which reduce the state allotment.

VISD's special program cost per rider is \$5.76, as compared to the peer average of \$12.48. All other peers' special program costs per rider are higher than VISD's. The special program riders per bus for VISD are the highest or most efficient among the peer districts at 32 riders per bus. Also, special program riders per route mile for VISD are the highest among the peer districts. VISD's special program service and cost effectiveness indicators

**EXHIBIT A-97
VISD AND PEER DISTRICTS OPERATING STATISTICS
2002-03**

DISTRICT	REGULAR PROGRAM			SPECIAL PROGRAM		
	ANNUAL RIDERS*	TOTAL ROUTE MILES	TOTAL BUSES	ANNUAL RIDERS*	TOTAL ROUTE MILES	TOTAL BUSES
Bryan ISD	1,042,380	894,564	115	94,140	293,104	29
Lamar CISD	1,646,640	1,707,363	146	79,560	401,348	27
Tyler ISD	803,700	726,288	107	74,160	282,336	39
Wichita Falls ISD	457,380	431,934	56	37,980	221,650	19
Peer Average	987,525	940,037	106	71,460	299,610	29
Victoria ISD	660,060	804,276	60	136,440	311,863	24

SOURCE: Texas Education Agency, School Transportation Operations Cost Report and School Transportation Route Services Report, 2002-03.
* Annual riders cal

**EXHIBIT A-98
VISD AND PEER DISTRICTS COST AS A PERCENTAGE OF TOTAL ACTUAL OPERATING EXPENSES
2002-03**

DISTRICT	TOTAL DISTRICT OPERATING EXPENSES*	TRANSPORTATION OPERATING COST*	PERCENT OF TOTAL EXPENSES
Bryan ISD	\$108,956,232	\$3,158,046	2.9%
Lamar CISD	\$131,488,317	\$4,589,547	3.5%
Tyler ISD	\$124,058,455	\$2,441,922	2.0%
Wichita Falls ISD	\$112,401,794	\$2,819,039	2.5%
Peer Average	\$119,226,200	\$3,252,139	2.7%
Victoria ISD	\$107,775,158	\$2,732,506	2.5%

SOURCE: Texas Education Agency, PEIMS, 2002-03; Texas Education Agency, School Transportation Operations Cost Report, 2002-03.
*Transportation operating expense excludes capital outlay and debt service and includes vehicle depreciation expense.

**EXHIBIT A-99
VISD AND PEER DISTRICTS COST
PER MILE
2002-03**

DISTRICT	COST PER MILE	
	REGULAR PROGRAM	SPECIAL PROGRAM
Bryan ISD	\$2.21	\$2.39
Lamar CISD	\$1.94	\$2.10
Tyler ISD	\$1.81	\$2.87
Wichita Falls ISD	\$2.93	\$3.49
Peer Average	\$2.22	\$2.71
Victoria ISD	\$2.04	\$2.49

SOURCE: Texas Education Agency, School Transportation Operations Cost Report and School Transportation Route Services Report, 2002-03.

compare favorably to the peer districts. **Exhibit A-100** compares district size based on square miles, service effectiveness or productivity, and cost-effectiveness indicators for VISD and peer districts based on TEA data.

Exhibit A-101 summarizes comparative data between VISD and the peer district averages. Overall, VISD's transportation statistics compare favorably to the peer averages, with the exception of the state allotment per mile, regular program cost per

rider, and riders per route mile. The linear density determines the state allotment. VISD's linear density is 0.90, the lowest of the peer group. VISD transports 31 percent of the total students enrolled, as compared to a peer average of 36 percent. The lower number of riders compared to the peer group contributes to the higher cost per rider and lower number of riders per route mile. VISD's overall cost per mile is lower than the peer group average.

Exhibit A-102 documents a five-year history of the total miles of transportation service provided by VISD by category of service. Route miles occur while a bus is on a defined route transporting students. These miles are reported on the TEA Operations Cost Report and reflect actual route miles operated, including miles from the transportation facility and the first student stop on the route and miles from the last student stop on the route back to the transportation facility. Extracurricular miles include student transportation for field trips and extracurricular activities such as athletics, band, and University Interscholastic League events. 'Other miles' consist of all miles other than route miles and extracurricular miles. VISD regular

**EXHIBIT A-100
VISD AND PEER DISTRICTS SERVICE EFFECTIVENESS
AND COST EFFECTIVENESS INDICATORS
2002-03**

DISTRICT	SQUARE MILES	REGULAR ROUTES			SPECIAL ROUTES		
		RIDERS/ROUTE MILE	RIDERS/BUS	COST/RIDER*	RIDERS/ROUTE MILE	RIDERS/BUS	COST/RIDER*
Bryan ISD	453	1.17	50	\$2.35	0.32	18	\$7.58
Lamar CISD	326	0.96	63	\$2.27	0.20	16	\$10.67
Tyler ISD	193	1.11	42	\$1.99	0.26	11	\$11.32
Wichita Falls ISD	500	1.06	45	\$4.47	0.17	11	\$20.35
Peer Average	368	1.08	50	\$2.77	0.24	14	\$12.48
Victoria ISD	602	0.82	61	\$2.95	0.44	32	\$5.76

SOURCE: Texas Education Agency, School Transportation Operations Cost Report and School Transportation Route Services Report, 2002-03 and VISD's Transportation Department.
* Cost per rider includes vehicle depreciation expense.

**EXHIBIT A-101
TRANSPORTATION PERFORMANCE STATISTICS
VISD AND PEER DISTRICT AVERAGE
2002-03**

PERFORMANCE MEASURE	VISD	PEER GROUP AVERAGE	FAVORABLE (UNFAVORABLE) PERCENT DIFFERENCE
State allotment as a percent of transportation operations cost			
▪ Regular program	36%	29%	19%
▪ Special program	29%	38%	3%
State allotment per mile	\$0.90	\$1.11	(23%)
Transportation operations costs as a percent of total district expenditures	2.54%	2.73%	7%
Regular program:			
▪ Cost per mile	\$2.04	\$2.13	9%
▪ Cost per rider	\$2.95	\$2.49	(16%)
▪ Riders per route mile	0.82	1.05	(28%)
▪ Riders per bus	61	52	15%

SOURCE: Texas Education Agency, School Transportation Operations Cost Report and School Transportation Route Services Report, 2002-03.

program route miles increased 5 percent, from 769,429 miles in 1998–99 to 804,276 miles in 2002–03. Special program route miles increased 10 percent from 283,937 miles in 1998–99 to 311,863 miles in 2002–03. Overall, total route miles increased 1 percent from 1998–99 to 2002–03.

Exhibit A–103 documents a five-year history of operations cost data, mileage, and riders for regular and special transportation programs. Over the five-year period, VISD’s operation costs increased while regular program miles decreased. Regular program riders increased only 3 percent, while special program riders decreased 2 percent during the time

**EXHIBIT A–102
VISD ANNUAL MILES OF SERVICE
1998–99 THROUGH 2002–03**

	1998–99	1999–2000	2000–01	2001–02	2002–03	PERCENT CHANGE 1998–2003
Regular Program						
Route Miles (with deadhead)	769,429	785,802	801,885	829,461	804,276	5%
Extracurricular Miles for Regular Program	183,675	174,685	157,961	151,758	141,007	(23%)
Other Miles	15,702	14,626	14,022	17,544	8,442	(46%)
Annual Regular Miles	968,806	975,113	973,868	998,763	953,725	(2%)
Special Program						
Route Miles (with deadhead)	283,937	303,524	326,002	319,356	311,863	10%
Extracurricular Miles for Special Program, Actual	2,848	4,364	4,948	4,328	3,693	30%
Other Miles	639	379	478	761	557	(13%)
Annual Special Miles	287,424	308,267	331,428	324,445	316,113	10%
Total Fleet Miles	1,256,230	1,283,380	1,305,296	1,323,208	1,269,838	1%

SOURCE: Texas Education Agency, School Transportation Operations Cost Reports, 1998–99 through 2002–03.

**EXHIBIT A–103
VISD REGULAR AND SPECIAL PROGRAM TRANSPORTATION HISTORICAL DATA
1998–99 THROUGH 2002–03**

	1998–99	1999–00	2000–01	2001–02	2002–03**	PERCENT CHANGE 1998–2003
Operations Cost*						
Regular Program	\$1,248,128	\$1,282,512	\$1,433,453	\$1,462,463	\$1,851,700	48%
Percent Change		3%	12%	2%	27%	
Special Program	\$575,453	\$626,895	\$650,326	\$728,226	\$739,031	28%
Percent Change		9%	4%	12%	1%	
Total	\$1,823,581	\$1,909,407	\$2,083,779	\$2,190,689	\$2,590,731	42%
Annual Odometer Miles						
Regular Program	968,806	975,113	973,868	998,763	953,725	(2%)
Percent Change		1%	(0%)	3%	(5%)	
Special Program	287,424	308,267	331,428	324,445	316,113	10%
Percent Change		7%	8%	(2%)	(3%)	
Total	1,256,230	1,283,380	1,305,296	1,323,208	1,269,838	1%
Cost per Mile						
Regular Program	\$1.29	\$1.32	\$1.47	\$1.46	\$1.94	50%
Percent Change		2%	11%	(1%)	33%	
Special Program	\$2.00	\$2.03	\$1.96	\$2.24	\$2.34	17%
Percent Change		2%	(3%)	14%	4%	
Annual Riders						
Regular Program	641,880	640,080	601,740	669,600	660,060	3%
Percent Change		(0%)	(6%)	11%	(1%)	
Special Program	138,780	127,980	138,060	144,900	136,440	(2%)
Percent Change		(8%)	8%	5%	(6%)	
Cost Per Rider						
Regular Program	\$1.94	\$2.00	\$2.38	\$2.18	\$2.81	44%
Percent Change		3%	19%	(8%)	28%	
Special Program	\$4.15	\$4.90	\$4.71	\$5.03	\$5.42	31%
Percent Change		18%	(4%)	7%	8%	

SOURCE: Texas Education Agency, School Transportation Operations Cost Report, Texas Education Agency, School Transportation Route Services Report, 1998–99 through 2002–03.

*Operations cost excludes capital outlay and debt service.

**2002–03 Operations cost excludes depreciation expense.

period. Special miles increased from 1998–99 through 2001–02, but decreased from 2001–02 to 2002–03. Operation costs for regular program transportation from 1998–99 to 2002–03 increased 48 percent, odometer miles decreased 2 percent, and regular program cost per odometer mile increased 50 percent. Regular program cost per rider increased 44 percent. Operations cost for special education transportation from 1998–99 to 2002–03 increased 28 percent, odometer miles increased 10 percent, and special program cost per odometer mile increased 17 percent. Special program cost per rider increased 31 percent. However, as presented previously in previous exhibits, VISD’s regular and special program costs per mile and special program cost per rider are lower than the peer average. The regular program transportation cost per odometer mile in 2002–03 is \$2.04, or 4 percent, below the peer average of \$2.13 per odometer mile. The special program transportation cost per odometer mile in 2002–03 is \$2.49, or 5 percent below the peer average of \$2.61. The special program cost per rider in 2002–03 is \$5.76, or 117 percent below the peer average of \$12.48. The regular program cost per rider in 2002–03 is \$2.95, or 6 percent above the peer average of \$2.77.

Exhibit A–104 summarizes VISD’s transportation operations cost for each of five years by object of expenditure as defined by TEA in the instructions for the annual TEA Route Services report. Expenditures for VISD salaries and benefits increased 43 percent from 1998–99 to 2002–03 and increased 22 percent between 2001–02 and 2002–03. In 2002–03, VISD’s salaries and benefits cost were 82 percent of total operations cost. Salaries and benefits are a major contributor toward increasing transportation operations cost.

Exhibit A–105 shows that VISD’s starting driver hourly wages for drivers and mechanics are below the peer district starting hourly wage. The starting hourly wage for bus monitors at VISD is slightly above the district peer average. VISD’s hourly wage

for mechanics is the only category above the peer district average.

ORGANIZATION AND MANAGEMENT

VISD’s Transportation Department is responsible for the planning and operation of transportation services for regular, CATE, and special program education routes. In addition, the department provides transportation resources for extracurricular activities and offers field trip services to all schools in the district. The Transportation Department is responsible for maintaining and servicing all school buses, 4 Food Services vehicles, and 4 vehicles operated by the Athletics Department. The general services fleet of 57 vehicles is maintained and serviced by the Plant Maintenance Department. All facets of student transportation fall under the supervision of the Transportation director.

Exhibit A–106 shows the organization of the Transportation Department. The Transportation Department employs 100 staff members, including the Transportation director, the assistant director, two driver supervisors/ dispatchers, one shop foreman, two clerical staff, 73 bus drivers (47 regular, 17 special ed, nine substitutes), 15 bus monitors for special education buses, and five maintenance personnel. The Transportation director reports to the assistant superintendent for School Administration and has held the position since October 1988.

All drivers and bus monitors are classified employees and are paid on an hourly basis. Classified employees are “non-exempt” status, which means that anyone working in excess of 40 hours per week is entitled to overtime. Overtime is paid at “time-and-a-half” for each portion of hours worked beyond 40 hours within a workweek. Extracurricular trips are paid at two rates; driving time and wait time. If extracurricular trips result in overtime, a weighted average between the driving time rate and wait time rate is calculated to determine the compensation due. Assignments of routes and extracurricular trips are +scheduled to avoid or minimize overtime. Drivers are not guaranteed a minimum number of hours per

EXHIBIT A–104

**VISD TRANSPORTATION OPERATIONS COST BY TYPE OF EXPENDITURE
1998–99 THROUGH 2002–03**

OBJECT	1998–99	1999–00	2000–01	2001–02	2002–03	PERCENT OF TOTAL 2002–03	PERCENT CHANGE
Salaries & Benefits	\$1,488,036	\$1,573,140	\$1,669,090	\$1,747,823	\$2,124,960	82%	43%
Percent Change		6%	6%	5%	22%		
Purchased Services	\$39,690	\$22,821	\$45,575	\$47,219	\$38,980	2%	(2%)
Percent Change		(43%)	100%	4%	(17%)		
Supplies & Materials	\$199,488	\$253,268	\$262,614	\$264,992	\$280,929	11%	41%
Percent Change		27%	4%	1%	6%		
Other Expenses	\$96,367	\$60,178	\$106,500	\$130,655	\$145,862*	6%	51%
Percent Change		(38%)	77%	23%	12%		
Total Cost	\$1,823,581	\$1,909,407	\$2,083,779	\$2,190,689	\$2,590,731		42%

SOURCE: Texas Education Agency, School Transportation Route Services Reports, 1998–99 through 2002–03.

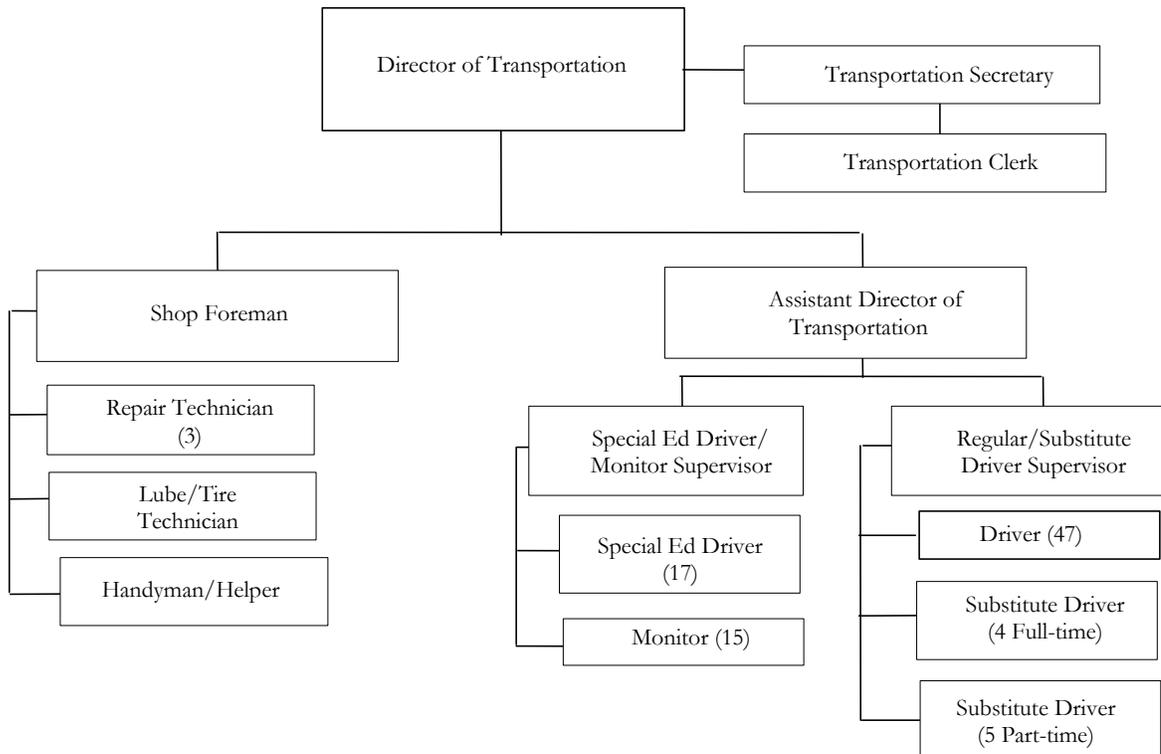
*Depreciation expense for 2002–03 netted from total other expense in 2002–03. Depreciation expense is not included in other expenses prior to 2002–03

**EXHIBIT A-105
TRANSPORTATION STAFF PAY RATES
VISD AND PEER DISTRICTS
2003-04**

DISTRICT	POSITION	HOURLY PAY RATES		
		LOW	MID-POINT	HIGH
Bryan ISD	Driver	\$8.90	\$10.70	\$12.97
	Monitor	\$6.74	\$6.80	\$7.25
	Mechanic	\$9.50	\$13.75	\$16.50
Lamar CISD	Driver	\$10.86	\$13.33	\$15.79
	Monitor	\$6.92	\$8.43	\$9.93
	Mechanic	\$12.65	\$15.52	\$18.39
Tyler ISD	Driver	\$8.74	\$12.45	\$19.59
	Monitor	\$7.25	\$9.30	\$14.16
	Mechanic	\$10.98	\$15.80	\$18.14
Wichita Falls ISD	Driver	Not available		
	Monitor			
	Mechanic			
Peer Average	Driver	\$9.50	\$12.02	\$15.59
	Monitor	\$6.97	\$7.62	\$8.89
	Mechanic	\$11.22	\$14.64	\$16.96
Victoria ISD	Driver	\$9.12	\$10.82	\$12.56
	Monitor	\$7.26	\$7.89	\$8.22
	Mechanic	\$8.23	\$11.81	\$18.44

SOURCE: VISD's Transportation Department, May 2004, and Peer district survey, May 2004.

**EXHIBIT A-106
VICTORIA ISD TRANSPORTATION DEPARTMENT ORGANIZATION**



SOURCE: VISD's Transportation Department, April 2004.

scheduled to avoid or minimize overtime. Drivers are not guaranteed a minimum number of hours per day or per week. Efforts are made to design routes and schedule drivers such that they receive the minimum number of hours to qualify for benefits.

The assistant director coordinates the assignments and scheduling of bus drivers, routes, and vehicles for student transportation. The assistant director also coordinates all arrangements for extracurricular trips on a rotating basis to minimize drivers incurring overtime. In addition to the director, the assistant director is the primary contact in addressing parental concerns and route-related questions and communicating with district campus personnel and department administrators.

The driver supervisors' primary responsibility is to ensure safe, courteous, and efficient transportation services are in place for regular route riders and special needs riders. The shop personnel include the shop foreman, three school bus and vehicle repair technicians, one lube/tire technician, and one handyman/helper. The Transportation clerk maintains written and computer records of vehicle maintenance and repair work orders. Personnel and payroll are key functions performed by the transportation secretary.

ROUTING AND SCHEDULING

VISD's Transportation Department operates 71 daily routes, including 17 special program routes. **Exhibit A-107** shows a detail of the daily routes operated in VISD.

The driver supervisors are responsible for scheduling the routes. Route scheduling has been a manual process. VISD purchased an automated routing and scheduling management system in late spring 2004 and plans to implement it by 2004-05. VISD provides transportation to 4,425 of the 14,438

enrolled students. Seventy-three drivers and 15 bus monitors operate the routes.

STUDENT TRANSPORTATION FLEET MAINTENANCE

The Transportation Department is responsible for maintaining and servicing the school transportation fleet. According to a fleet inventory list for the 2003-04 school year, VISD's fleet consists of 79 buses, 4 suburban trucks assigned to the Athletics Department, 2 refrigerator trucks, 2 vans assigned to food services, and 1 wrecker which is an old converted bus. The refrigerator trucks are serviced by the Transportation Department because the department's work bays accommodate the large trucks. Five of the seventy-nine buses are designated as spares. All vehicles are fueled at the Transportation Department's facility. The student transportation fleet is parked at the Transportation Department's facility within a fenced area.

SAFETY AND TRAINING

The goal of any school Transportation function is to safely transport students to and from school. Achieving this goal requires training and a strong safety awareness program.

VISD uses the TEA Regional Education Service Center III (Region 3) for bus driver certification and recertification training. All drivers attend in-service training developed by the Transportation director and a driver supervisor. The content includes behind the wheel and safety training. Training for individual needs of special program passengers is conducted by one of the special needs drivers with assistance from the Special Education Department staff.

**EXHIBIT A-107
VISD BUS ROUTES
2003-04**

AM/PM ROUTES	
Number	Route
37	Regular – all elementary, middle, and high school campuses
17	Special Program – special needs students
1	Bilingual – Hopkins Magnet and Smith Elementary
5	Magnet schools
1	Alternative campus
1	Even Start
MID-DAY ROUTES	
2	Career Development, Athletics, Band
7	Pre-kindergarten

SOURCE: VISD Transportation Department, April 2004.

**CHAPTER 11
ASSET AND RISK MANAGEMENT**

Texas school districts have a fiduciary responsibility to protect publicly financed assets provided to educate children. Managing the cash and physical assets of a school district is an ongoing challenge. Cash must be accounted for and prudently invested, maximizing interest earnings while complying with the Public Funds Investment Act (Act). Physical assets must be tracked and inventoried, and fixed asset capitalization policies and procedures must comply with Governmental Accounting Standards Board (GASB) Statements 34 and 35.

An effective risk management program controls costs by ensuring that an organization is adequately protected against all significant losses, with the lowest possible insurance premiums. This program should include risk identification and measurement and techniques to minimize the impact of risk. Risk is defined as a measurement of uncertainty, where the outcome can only be estimated. A district’s insurance programs for employee health, workers’ compensation, and school district assets should be sound and cost effective to protect the district from financial loss and should provide employees with health insurance coverage at a reasonable cost.

Capital asset management should efficiently and accurately account for district property and guard against theft and obsolescence. Capital assets are assets that have been acquired for use in operations. Such assets are generally not for resale and have an estimated useful life of at least one year. Examples include land, buildings, machinery, computer and office equipment, and furniture.

The management of the asset and risk function at VISD is somewhat nontraditional in that risk management is overseen by the director of Plant Maintenance and Purchasing, the payroll supervisor oversees health insurance and other employee benefits, cash management is the responsibility of the chief financial officer, and the staff accountant monitors capital assets. The risk manager, who reports to the

director of Plant Maintenance and Purchasing, is responsible for managing the district’s workers’ compensation program, as well as the district’s property and liability insurance coverage.

Victoria Independent School District (VISD) issues general obligation bonds to provide the necessary funds for the acquisition and construction of facilities. General obligation bonds are direct obligations that pledge the full faith and credit of the district. Principal and interest payment requirements are paid from future revenues of the debt service fund, consisting of property taxes collected by the district and interest income. According to the VISD Comprehensive Annual Financial Report (CAFR) for the year ended August 31, 2003, the district has never defaulted on any principal or interest payment. VISD paid \$2,176,955 in interest in 2002–03. As of August 31, 2003, the outstanding bonds totaled \$34,691,189. **Exhibit A-108** summarizes the bonds payable for the year ended August 31, 2003.

VISD’s debt service requirement to retire this debt is presented in **Exhibit A-109**.

VISD has two outstanding notes for maintenance purposes, in accordance with the provisions of the Texas Education Code Section 45.108. On October 15, 2003, VISD borrowed additional funds from Prosperity Bank to purchase buses and maintenance vehicles. **Exhibit A-110** summarizes the outstanding loans payable reported in the 2003 CAFR.

CASH AND INVESTMENT MANAGEMENT

For a school district to achieve its instructional goals and objectives, cash and investments must be managed daily. Effective cash and investment management involves establishing and maintaining beneficial banking relationships, forecasting cash requirements accurately and on a timely basis so that funds are available when needed, and maximizing returns on assets deposited in appropriate, approved, and safe investment vehicles.

**EXHIBIT A-108
VISD BONDS PAYABLE
AS OF AUGUST 31, 2003**

DESCRIPTION	ORIGINAL AMOUNT	INTEREST RATE	ISSUED	RETIRED	OUTSTANDING BALANCE
Refunding Bonds – Series 1985	\$16,795,000	6.0%	\$ 0	\$208,887	\$656,253
Refunding Bonds – Series 1992	17,355,000	5.0%	0	0	599,936
Unlimited Tax School Bldg Bonds – Series 1998	31,000,000	4.75 – 6.75%	0	770,000	27,930,000
Refunding Bonds – Series 2002	6,780,000	2.0 – 4.0%	0	1,275,000	5,505,000
Total	\$71,930,000		\$ 0	\$2,253,887	\$34,691,189

SOURCE: VISD, Comprehensive Annual Financial Report (CAFR), for the year ended August 31, 2003.

**EXHIBIT A-109
VISD DEBT SERVICE OBLIGATIONS
AS OF AUGUST 31, 2003**

YEAR ENDING AUGUST 31:	PRINCIPAL	INTEREST	TOTAL REQUIREMENTS
2004	\$ 2,304,185	\$ 2,383,175	\$ 4,687,360
2005	2,376,177	2,301,789	4,677,966
2006	2,449,736	2,209,218	4,658,954
2007	2,546,155	2,108,668	4,654,823
2008	1,319,576	3,413,897	4,733,473
2009-2013	6,150,360	7,417,816	13,568,176
2014-2018	7,630,000	3,472,500	11,102,500
2019-2023	9,915,000	1,291,375	11,206,375
Total	\$34,691,189	\$24,598,438	\$ 59,289,627

SOURCE: VISD, CAFR, August 31, 2003

**EXHIBIT A-110
VISD LOANS PAYABLE
AS OF AUGUST 31, 2003**

NOTE	ORIGINAL LOAN	PRINCIPAL PAID	INTEREST PAID	OUTSTANDING BALANCE
Southside Bank VISD Maintenance Notes Series 2001	\$ 481,236	\$45,457	\$25,184	\$ 389,126
TASB VISD Maintenance Notes Series 2001Q	\$640,000	50,000	31,450	590,000
Prosperity Bank VISD Notes 9/1/03	\$781,487	-	-	781,487
Total	\$1,902,723	\$95,457	\$56,634	\$1,760,613

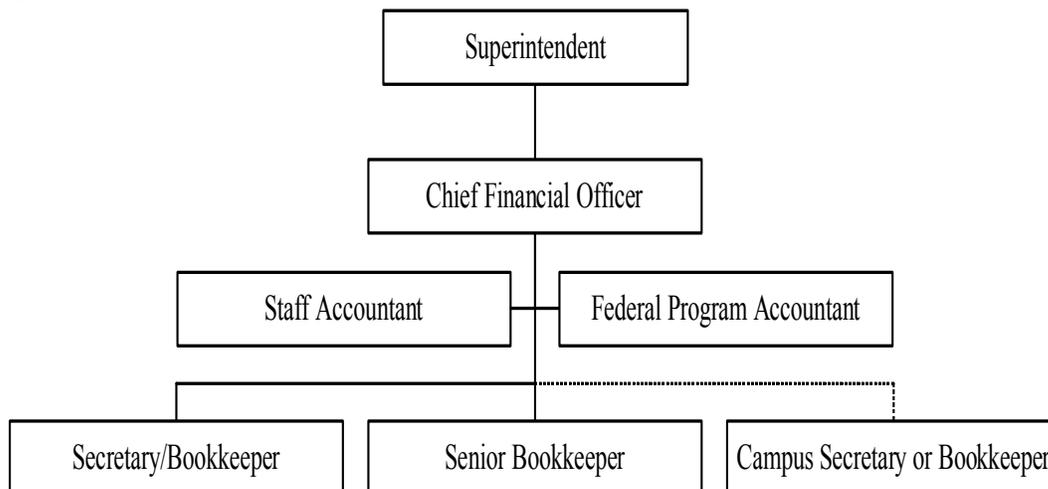
SOURCE: VISD, CAFR, August 31, 2003.

VISD has three investment officers, the chief financial officer, the staff accountant, and the federal program accountant. **Exhibit A-111** shows the positions and reporting relationships of the district's cash management function.

The district maintains four centralized bank accounts and 22 school activity accounts. Prosperity Bank has been the district's depository institution since September 1, 2001. The school board recently

approved a two-year extension of the depository contract through August 31, 2005. The district does not pay banking fees under the existing contract. The previous financial institution's depository contract was based on a compensating balance arrangement. A compensating balance arrangement requires the district to maintain a sufficient balance in order to compensate the bank for account maintenance, items processing, and various other banking services. The bank applies an earnings credit rate to available cash balances each

**EXHIBIT A-111
VISD CASH MANAGEMENT ORGANIZATION
2003-04**



SOURCE: VISD, Business & Finance Department, April 2004.

month to compute the district's interest earned. Accounts are analyzed and settled monthly. If earnings on the balances exceed the bank's monthly service charges, no service charge is due. If earnings are less than service charges, the deficiency is charged to the operating account each month. The chief financial officer stated that the cost of the compensating balance contract was much higher than the current contract with Prosperity Bank. The interest rate on the district's bank accounts, as of April 30, 2004 was 2.27 percent. **Exhibit A-112** provides a listing of the district's bank accounts as of March 31, 2004.

WRITTEN POLICIES

Investments shall be made in accordance with written policies approved by the board. The investment policies must primarily emphasize safety of principal and liquidity and must address investment diversification, yield and maturity, and the quality and capability of investment management. The policies must include the following:

- a list of the types of authorized investments in which the board's funds may be invested;
- the maximum allowable stated maturity of any individual investment owned by the board;

- for pooled fund groups, the maximum dollar-weighted average maturity allowed based on the stated maturity date of the portfolio;
- methods to monitor the market price of investments acquired with public funds; and
- a requirement for settlement of all transactions, except investment pool funds and mutual funds, on a delivery versus payment basis.

INVESTMENT STRATEGIES

As part of the investment policy, the board shall adopt a separate written investment strategy for each of the funds, or group of funds, under the board's control. Each investment strategy must describe the investment objectives for the particular fund, including the following:

- understanding the suitability of the investment to the financial requirements of the board;
- preservation and safety of principal;
- liquidity;
- marketability of the investment if the investment needs to be liquidated before maturity;

**EXHIBIT A-112
VISD BANK ACCOUNTS
AS OF MARCH 31, 2004**

FINANCIAL INSTITUTION	ACCOUNT NAME	BALANCE AT MARCH 31, 2004	PURPOSE OF ACCOUNT
Prosperity Bank	General Operating Fund	\$1,411,142	Accounts Payable Obligations
Prosperity Bank	Payroll Fund	1,388,553	Payroll Obligations
Prosperity Bank	Debt Service Fund	1,075	Interest & Sinking Obligations
Prosperity Bank	Insurance Fund	195,834	Self Insurance Obligations
Prosperity Bank	Athletic Fund	23,219	Activity account
Prosperity Bank	Career Development School	10,004	Activity account
Prosperity Bank	Mitchell Guidance School	724	Activity account
Prosperity Bank	Profit Academic Center	8,986	Activity account
Prosperity Bank	Crain Middle School	84,902	Activity account
Prosperity Bank	Patti Welder Magnet School	52,163	Activity account
Prosperity Bank	Howell Middle School	83,468	Activity account
Prosperity Bank	Aloe Elementary School	16,518	Activity account
Prosperity Bank	Dudley G/T Magnet School	24,970	Activity account
Prosperity Bank	F.W. Gross Montessori School	1,855	Activity account
Prosperity Bank	Guadalupe Elementary School	2,337	Activity account
Prosperity Bank	Hopkins Fine Arts Academy	8,434	Activity account
Prosperity Bank	Juan Lin Math & Science School	10,869	Activity account
Prosperity Bank	O'Connor Magnet School	13,981	Activity account
Prosperity Bank	Rowland Elementary School	10,274	Activity account
Prosperity Bank	Shields Accelerated Magnet School	8,869	Activity account
Prosperity Bank	Smith Elementary School	18,803	Activity account
Prosperity Bank	Vickers Elementary School	17,906	Activity account
Prosperity Bank	William Wood Elementary School	2,811	Activity account
Prosperity Bank	Mission Valley Elementary School	7,895	Activity account
Prosperity Bank	DeLeon Elementary School	19,063	Activity account
Prosperity Bank	Chandler Elementary School	25,179	Activity account
	Total	\$3,449,834	

SOURCE: VISD, Business and Finance Department, March 2004.

- diversification of the investment portfolio; and
- yield.

Exhibit A-113 shows a summary of VISD’s investments.

STUDENT ACTIVITY FUNDS

TEA’s *Financial Accountability System Resource Guide* (FASRG) outlines the requirements for student activity fund accounting. Three funds may be used to record activity fund money. According to FASRG, the school district’s intent for the use of this money should dictate which fund is used to record the funds as shown in Exhibit A-114.

RISK MANAGEMENT

Risk management is the identification, analysis, and reduction of different types of risk through insurance and safety programs that are designed to protect an organization’s assets and employees. Workers’ compensation protects employees in case of a work-related accident or injury. Property and casualty insurance protects VISD from liabilities that arise from property damage, bodily injury, and other risk. A group health plan ensures that VISD employees are protected from catastrophic illness and financial ruin by spreading that risk across the pool of employees.

An effective risk management program includes cost-effective insurance and loss-control techniques that minimize financial liability for the institution and its employees. Sound risk management involves identifying operational areas where hazardous situations may occur or where opportunities for physical property loss exist. The risk management function is responsible for the cost-effectiveness of health insurance, workers’ compensation, property insurance, and alternative insurance coverage, such as self-insurance and other products.

The risk management function at VISD is split between the Payroll Department and the Plant Maintenance Department. Payroll manages health insurance and other employee benefits. The risk manager, as part of the Plant Maintenance Department, oversees the district’s property and casualty insurance and its self-funded workers’ compensation program.

PROPERTY & CASUALTY INSURANCE

The risk manager is responsible for obtaining and maintaining VISD’s property and casualty insurance coverage. Property and casualty insurance includes coverage for facilities, vehicles, equipment, personal injury, and professional and general liability.

**EXHIBIT A-113
VISD SUMMARY OF INVESTMENTS
AS OF FEBRUARY 29, 2004**

SECURITY DESCRIPTION	YIELD	GENERAL FUND FUND 199	FOOD SERVICE FUND 240	DEBT SERVICE FUND 599	CAPITAL PROJECTS	WORKERS' COMP FUND 893	TOTAL INVESTMENTS
Lone Star Liquidity Fund	Variable	\$ -	\$ -	\$ -	\$ -	\$ 265,923	\$265,923
Liquidity Corporate Fund	Variable	3,177,830	\$790,681	\$ 675,119	-	1,349,342	5,992,972
Wells Fargo Asset Mgmt	Variable	-	-	-	952,976	-	952,976
Prosperity Bank MMF	Variable	16,804,848	-	42,266	-	-	16,847,114
Prosperity Bank CD	1.65%	4,880,968	-	-	-	-	4,880,968
Prosperity Bank CD	1.65%	5,639,583	-	-	-	-	5,639,583
Prosperity Bank CD	1.75%	8,009,180	-	-	-	-	8,009,180
Total Investments by Fund		\$38,512,409	\$790,681	\$717,385	\$952,976	\$1,615,265	\$42,588,716

SOURCE: VISD, Business and Finance Department, February 2004.

**EXHIBIT A-114
STUDENT ACTIVITY FUND ACCOUNTING DESCRIPTION**

FUND	PURPOSE
General Fund	Used if the district’s policy allows for excess or unused funds to be recalled into the General Fund for general use.
Special Revenue Fund (Fund 461 – Campus Activity Fund)	Used if individuals other than students involved in the activity fund can use activity fund money in a manner that does not directly benefit students but will benefit the school.
Agency Fund (Fund 865 – Student Activity Account for Student Clubs and Class Funds)	Used if activity fund financial decisions rest solely with students.

SOURCE: Texas Education Agency, *Financial Accountability System Resource Guide* (FASRG), 1999.

Effective December 1, 2003, VISD changed its property and liability insurance carrier from Zurich American Insurance to the Texas Association of School Boards (TASB) Self-Funded Risk Pool. Under the old carrier, each campus in the district carried a \$100,000 deductible for property coverage. The new carrier offered blanket coverage for VISD. The district included other areas that had not been insured previously, such as tennis court lights, bleachers, transformers, baseball and softball fences, small storage buildings, backstops, batting cages, soccer goals, fences at other facilities, and marquees. Following the hurricane in 2003, the Federal Emergency Management Agency (FEMA) approved reimbursement of up to 75

percent of uninsured losses, including the deductible. Since any future losses cannot be applied to FEMA, the district made the decision to include this additional property on the insurance schedule.

Flood insurance was previously purchased for some VISD facilities through Omaha Mutual Insurance under an agreement with the federal government. The new government carrier is now Fidelity National Insurance Company. Flood insurance rates have increased.

Exhibit A-115 provides a detailed summary of property and casualty policies currently in force.

**EXHIBIT A-115
VISD PROPERTY AND CASUALTY COVERAGE**

TYPE OF COVERAGE	INSURER	DESCRIPTION OF LIMITS AND DEDUCTIBLES	POLICY EXPIRES	PREMIUM AMOUNT
Student UIL	G.M. Southwest, Inc.	Deductible: 30% - 50%	07/31/04	\$64,800
Athletic Catastrophic	American International Group	Coverage: \$5,000,000 Lifetime Accident: \$5,000,000 Accidental Death: \$10,000 Deductible: \$25,000	07/31/04	\$3,622
Property Coverage Risk of Direct Physical Loss, Replacement Cost	TASB	Deductible: \$10,000 Limits: \$195,788,605	12/01/04	\$420,946
Floater Band Equip.	TASB	Deductible: \$1,000 Limits: \$1,087,516	12/01/04	\$3,263
Floater EDP, D/M, EE	TASB	Deductible: \$10,000 Limits: \$17,789,351	12/01/04	\$48,031
Floater Property Extra Expense	TASB	Deductible: Property Deductible Applies (PDA) Limits: \$ 1,000,000	12/01/04	Included
Floater Fine Arts	TASB	Deductible: PDA Limits: \$100,000	12/01/04	Included
Floater Valuable Papers	TASB	Deductible: PDA Limits: \$50,000	12/01/04	Included
Flood/Earthquake Excess NFIP, excludes zone A/V	TASB	Deductible: PDA Limits: \$10,000,000	12/01/04	\$900
Liability Coverage General Liability	TASB	Deductible: \$1,000 Limits: \$1,000,000	12/01/04	\$10,173
School Professional Legal Liability	TASB	Deductible: \$25,000 Limits: \$1,000,000	12/01/04	\$130,815
Auto Liability 225 vehicles	TASB	Deductible: \$1,000 Limits: \$100/300/100	12/01/04	\$42,125
Private Passenger vehicles 1994 & newer vehicles only Comprehensive	TASB	Deductible: \$500.00 Limits: \$36,116	12/01/04	\$42
Collision	TASB	Deductible: \$1,000 Limits:	12/01/04	\$101
All Other Vehicles 1994 & newer vehicles only Comprehensive \$500 trucks/vans/trailers, \$1,000 buses	TASB	Deductible: \$500/\$1,000 Limits \$3,123,184	12/01/04	\$15,140
Collision	TASB	Deductible: \$1,000 Limits:	12/01/04	\$3,182

EXHIBIT A-115 (CONTINUED)
VISD PROPERTY AND CASUALTY COVERAGE

TYPE OF COVERAGE	INSURER	DESCRIPTION OF LIMITS AND DEDUCTIBLES	POLICY EXPIRES	PREMIUM AMOUNT
Mobile Equipment Comprehensive	TASB	Deductible: \$1,000 Limits: \$186,300	12/01/04	\$1,429
Collision	TASB	Deductible: \$1,000 Limits:	12/01/04	\$463
Crime Coverage	TASB	Deductible: \$1,000 Limits: \$50,000	12/01/04	\$2,790
Equipment Breakdown	TASB	Deductible: \$10,000 Limits: \$1000,000,000	12/01/04	\$11,489
Flood Insurance	Fidelity National Insurance Company	F.W. Gross Magnet School Coverage: \$500,000 Building A, Contents \$500,000 Deductible: \$500/ \$500	03/17/05	\$7,117
		Coverage: \$272,300 Cafeteria, \$49,700 Contents Deductible: \$1,000/\$1,000	05/09/05	\$2,889
		Coverage: \$500,000 Annex Bldg. Contents \$500,000 Deductible: \$500/ \$500		\$7,117
	Omaha Property & Casualty	Rowland Elementary School Coverage: \$500,000 Building & Contents Deductible: \$1,000	08/23/04	\$1,359
		Coverage: \$110,000 Multi Bldg, \$21,000 Contents Deductible: \$1,000/ \$1,000	05/09/05	\$303
		William Wood Elementary School Coverage: \$23,000 Water Treatment Plant Deductible: \$1,000	05/09/05	\$1,063
		Coverage: \$78,000 Portable Bldgs, \$18,800 Contents Deductible: \$1,000/ \$1,000	05/09/05	\$2,564
		Coverage: \$236,000 Bldg A, \$43,000 Contents Deductible: \$1,000/ \$1,000	05/09/05	\$4,892
		Coverage: \$457,000 Bldg B, \$104,800 Contents Deductible: \$1,000/ \$1,000	05/09/05	\$5,204
		Coverage \$500,000 Gym, \$109,200 Contents Deductible: \$\$1,000/ \$1,000	05/09/05	\$2,507
		Coverage: \$211,800 Bldg D, \$48,500 Contents Deductible: \$1,000/ \$1,000	05/09/05	

SOURCE: VISD Risk Management Department, April 2004.

EMPLOYEE HEALTH INSURANCE

The district’s employee benefit plans are under the supervision of the chief financial officer. The Payroll supervisor is responsible for the daily oversight of employee benefits. Two Payroll clerks assist her in administering the district’s self-insured employee health plan. **Exhibit A-116** presents the organization and reporting structure of the payroll staff responsible for overseeing the employee benefits department at VISD.

Collier County School District (CCSD) in Florida has been proactive in finding ways to keep the costs of benefits affordable. It has developed an innovative and cost-effective benefits plan. The district has created a benefits committee that includes representation from each of the three employee unions. This representation allows the unions to see the cost of the benefits provided by the district, potential cost increases, and creates greater buy-in to negotiated benefits. With the help of its insurance consultant the district has

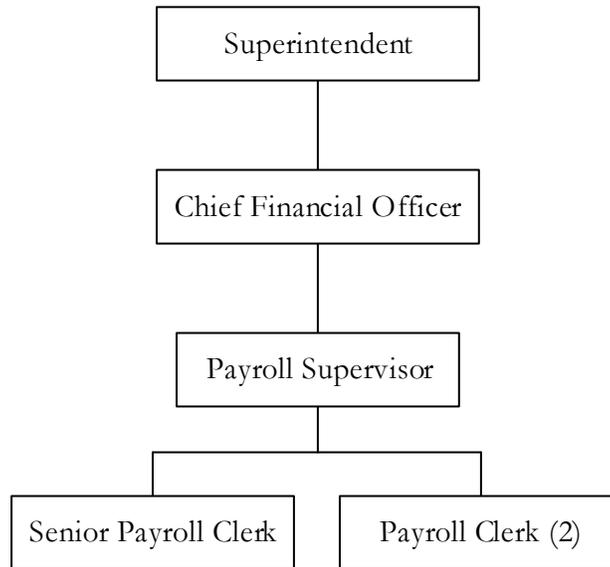
identified medical claims trends and developed strategies to reduce the claims costs and further wellness among employees.

Each year, CCSD reevaluates whether its self-insurance program is more cost effective than a fully insured program. The employee benefits committee reviews the cost of providing the same benefits to employees as the previous year and determines if changes to the plan must be made to ensure its financial viability.

CCSD undertook a number of initiatives in its Employee Benefit functions to protect the district against catastrophic loss and contain costs in an environment of escalating health care costs and risk, and estimates that it will be able to bring its health costs down by 30 percent. Some of the implemented programs include the following:

- Smart Choice, a disease management program, was initiated to identify the most frequently reported diagnoses among its employee population. The

**EXHIBIT A-116
VISD EMPLOYEE BENEFITS FUNCTION
2003-04**



SOURCE: VISD, Payroll Department, April 2004

Smart Choice program works with the employee to try to manage the disease before high cost medical intervention is required. In response to the diagnoses study, CCSD included an Employee Assistance Program to deal with stress-related illness, a prevalent diagnosis in the district.

- CCSD implemented treatment pathways for specific conditions. For example, the following is a specified treatment pathway for back injuries:
 - conservative self-care for one week;
 - physical therapy, limited to nine treatments for three weeks and then must be reevaluated for continued treatment or testing;
 - an MRI is considered after five weeks; and
 - limit epidural pain medication to three treatments.
- CCSD is a member of the Collier County Health Consortium. The consortium is composed of five Collier County employers (Collier County School District, Collier County Government, Naples Community Hospital, Collier County Sheriff's Office, and the city of Naples) that have pooled their buying power in an attempt to control the escalating cost of providing health insurance coverage to their employees and their dependents. The consortium was able to negotiate an eight percent reduction in the local network provider, Community Health Partners (CHP), fee schedule.

By pooling their "buying power", the consortium has been able to reduce its costs.

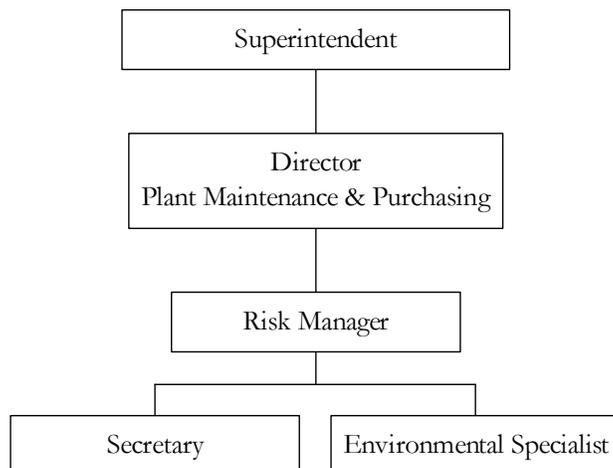
WORKERS' COMPENSATION INSURANCE

The purpose of the workers' compensation system is to provide a method to restore an injured worker as closely as possible to the worker's pre-injury earning capacity and potential. Returning to suitable work helps employees more readily recover from injuries and allows employers to gain lost productivity, lower compensation costs, and reduce dependency on other types of assistance. It is helpful if employers have some type of limited duty, or alternate work, to help workers gradually get used to being back in the workforce.

The Texas Association of School Boards Risk Management Fund administers VISD's self-insured workers' compensation program. TASB, as the third party administrator, provides the district with detailed reports of its workers' compensation claims so that the district can analyze its claims history and determine where the district may be able to reduce claims. The risk manager carries out the daily responsibilities for the district's workers' compensation function. **Exhibit A-117** illustrates the current organizational structure related to the workers' compensation function at VISD.

The Texas Legislature regulates workers' compensation insurance. In 2001, significant changes were made to the existing law to improve the quality of care for injured workers, increase the accountability of doctors

EXHIBIT A-117
VISD WORKERS' COMPENSATION ORGANIZATION
2003-04



Source: VISD, Risk Management Department, April 2004

and insurance carriers, and reduce overall medical costs in the workers' compensation system. These eight changes include the following:

- Improving the ability of the Texas Workers' Compensation Commission (TWCC) to regulate and sanction doctors who do not provide quality medical care;
- Allowing the state to establish regional healthcare delivery networks with the guidance of a network advisory committee;
- Promoting return-to-work programs by requiring employers to report whether they have modified duty and by requiring insurance carriers to provide return-to-work services to employers;
- Improving injured employees' ability to receive prescriptions filled for the first seven days after their injury, giving preference to generic drugs;
- Revising the process for seeking an independent medical opinion for impairment rating and data of maximum medical improvement issues (A TWCC-designated doctor, not an insurance carrier-selected doctor, will examine the injured employee first. If the insurance carrier disputes the designated doctor's opinion, the carrier can request the TWCC to order the injured employee to attend a required medical exam conducted by a doctor selected by the insurance carrier);
- Expanding the definition of lifetime income benefits to include workers with third-degree burns;
- Allowing injured workers with multiple jobs to calculate their income benefits based on all their wages, not just the wages of the job where they were injured. (Insurance carriers can seek reimbursement for these additional benefits from the state's Subsequent Injury Fund.); and
- Prohibiting non-subscribers from asking their employees to waive their right to sue for damages for on-the-job injuries.

CAPITAL ASSET MANAGEMENT

In governmental fund accounting used by school districts, capital assets are purchased with money available within a given fund. Capital assets are tangible items that typically have a significant value. Therefore, it is critical to maintain control of and accountability for these items. "Capital asset management" involves the manner in which assets are purchased and accounted for and methods for maximizing the disposal of surplus or obsolete equipment so that it is returned into productive channels. Capital asset management should account for district property efficiently and accurately and safeguard it against theft and obsolescence. Capital assets are items acquired for use in operations that generally are not for resale and have an estimated useful life of at least one year. Examples include land, buildings, machinery, computer and office equipment, and furniture.

Capital asset records are necessary to designate who is responsible for the custody and maintenance of individual items and help to estimate future capital requirements. School districts generally control capital transactions for acquiring capital assets, using a well-defined authorization procedure. Separate accountability for capital assets is a specific legal requirement of many federal programs.

Reasons to maintain accurate accounting records of capital assets include the following:

- Properly kept capital asset records furnish taxpayers with information about their investments in the school, in contrast to expenditures, for operations;
- Capital asset records provide the basis for adequate insurance coverage;
- Systematic physical inventories of capital assets allow the institution to survey the physical condition of its assets and assess the need for repair, maintenance, or replacement;
- Periodic inventories establish a system of accountability for custody of individual items;
- For budgeting purposes, reliable information about capital assets can provide material assistance in determining future requirements; and
- Periodic inventories identify lost or stolen items so that insurance claims can be filed, additional controls instituted, and accounting records adjusted to reflect the losses.

School districts should maintain detailed subsidiary records to maximize control of capital assets. These records should include at least the following information:

- item purchased;
- date of purchase;
- purchase price;
- life expectancy of the asset;
- location of the asset;
- inventory number assigned to the asset;
- fund from which the asset was purchased; and
- any other information that may be useful for control.

Regardless of its physical form, the subsidiary record should provide a complete description of the item, cost and purchase date, and the item's location for easier tracking.

Adequate accounting procedures and records for capital assets will protect VISD property. In addition to protecting property, an appropriate capital asset system should designate responsibility for custody and proper use, provide data for financial control and capital asset management, develop financial reports, and ensure adequate insurance coverage.

Any material change in recording the distribution or disposal of capital assets is a financial matter that

should be decided by VISD administration. Management must maintain an appropriate level of internal control to protect capital assets at all times.

Most Texas school districts periodically inventory certain capital assets, such as furniture and equipment. Discrepancies between the capital asset inventory list and physical inventory should be settled in a timely manner, and missing items should be dealt with consistently, according to district policy.

Research has shown that the most successful entities perform five capital asset functions:

- Tagging all valued assets using a bar-code system, as the assets are received;
- Using accounting codes to track capitalized capital assets and expensed assets;
- Inventorying all assets annually;
- Using annual inventory results to set insurance rates; and
- Identifying inventory shrinkage and tightening controls as necessary.

In its Capital Asset Guide, the Texas Comptroller of Public Accounts defines capital assets as purchased, constructed, or donated real or personal property with a useful life greater than one year and with a value equal to or greater than the capitalization threshold for the particular classification of the asset. Items that cost less than the threshold amount for that classification are recorded as an operating expense of the appropriate fund. **Exhibit A-118** displays standard capitalization thresholds for each major class of assets.

VISD defines capital assets as having a single value of \$5,000 or greater and an estimated useful life of more than one year. Assets in this category include furniture, fixtures, vehicles, and equipment, including hardware and software, and are generally referred to as "personal property."

GASB Statement 35 requires that public colleges and universities be included in the financial reporting guidelines of GASB Statement 34, Basic Financial Statements – and Management's Discussion and Analysis – for State and Local Governments. GASB issues accounting and financial reporting rules for state and local governments throughout the United States. GASB Statement 34, issued in June 1999, requires that capital assets be reported in the financial statements after depreciation and that assets be depreciated each accounting period. "Depreciation" is a periodic expense recognized on the accounting records of an organization. The useful life of an asset must be determined to properly estimate depreciation. Government entities must maintain capital asset

EXHIBIT A-118
CAPITALIZATION THRESHOLDS BY CLASS OF ASSETS

ASSET	TOTAL
Land/land improvements	Capitalize All
Buildings/building improvements	\$100,000
Facilities and other improvements	\$100,000
Infrastructure	\$500,000
Personal property – furniture/equipment	\$5,000
Library books/materials (collections)	Capitalize All
Works of art/historical treasures	Capitalize All
Software developed for internal use	\$100,000
Leasehold Improvements	\$100,000

SOURCE: Texas State Comptroller's office, Capital Asset Guide — Effective 9/1/01.

systems that calculate and account for asset depreciation amounts. Before GASB 34, governments expensed all their assets at acquisition, rather than recognizing a portion of expense each accounting period during the asset's useful life.

VISD had total capital assets of \$71 million after depreciation as of August 31, 2003, as presented in **Exhibit A-119**.

The staff accountant is responsible for monitoring the district's capital assets. The secretary/bookkeeper enters all capital assets into the system based on the coding reported on the purchase order identifying it as a capital asset. The staff accountant reviews the data to ensure it is correct. Capital assets are reconciled monthly. The federal programs accountant is responsible for calculating the depreciation expense.

The state has developed best practices to help local governments develop effective, efficient capital assets management systems. These practices offer a comprehensive solution to deficient capital assets management systems with steps to develop and maintain a better system. Effective management requires the involvement of key individuals throughout the school system. **Exhibit A-120** summarizes these best practices.

Districts having control over capital assets assign responsibility to specific individuals and then hold those individuals accountable for any missing assets or other discrepancies. In Hillsborough County Florida, the district has instituted strong asset control measures. The principal of every school receives an asset listing at the beginning of the year. At the end of the year, a physical inventory is taken and the results are compared to the asset listing from the beginning of the year. If there are any items missing, the proper paperwork should have been filed. This paperwork includes either a transfer form indicating that the asset has been transferred to another site or a Property Loss/Damage Report (PDR). The PDR requires the following information:

- site number;
- date discovered missing;
- name of facility reporting loss;
- type of loss (vandalism, fire, storm, theft/burglary, theft/missing, disappearance, money, or other);
- name of principal or site supervisor;
- sender;
- date;
- title of sender; and
- schedule of school district owned items involved.

EXHIBIT A-119
VISD CAPITAL ASSETS
FOR THE YEAR ENDED AUGUST 31, 2003

ASSET CLASS	BALANCE 9/1/2002	ADDITIONS	DELETIONS	TRANSFERS	BALANCE 8/31/2003
Land	\$1,960,488	\$ 0	\$ 0	\$ 0	\$1,960,488
Construction in Progress	311,524	59,642	0	(359,266)	11,900
Total Capital Assets (Not Depreciated)	2,272,012	59,642	0	(359,266)	1,972,388
Land Improvements	2,981,014	214,308	0	0	3,195,322
Less Accumulated Depreciation	(797,530)	(154,275)	0	0	(951,805)
Buildings & Improvements	79,678,258	1,058,838	0	359,266	81,096,362
Less Accumulated Depreciation	(15,323,182)	(2,074,763)	0	0	(17,397,945)
Furniture & Equipment	10,768,361	459,096	(138,780)	0	11,088,677
Less Accumulated Depreciation	(7,708,573)	(806,233)	127,976	0	(8,386,830)
Total Capital Assets (After Depreciation)	93,427,633	1,732,242	(138,780)	359,266	95,380,361
Less Accumulated Depreciation	(23,829,285)	(3,035,271)	127,976	0	(26,736,580)
Net Total Capital Assets (After Depreciation)	69,598,348	(1,303,029)	(10,804)	359,266	68,643,781
Net Governmental Activities Capital Assets	\$71,870,360	(\$1,243,387)	(\$10,804)	\$ 0	\$70,616,169

SOURCE: VISD, CAFR, for the year ended August 31, 2004.

EXHIBIT A-120

BEST PRACTICES FOR AN EFFECTIVE CAPITAL ASSETS MANAGEMENT SYSTEM

<p>Preliminary Steps</p>	<p>Identify individuals in the district that will have key capital asset responsibilities and define those responsibilities. Devise policies and procedures to govern capitalization thresholds, inventory, accounting, employee accountability, transfers, disposals, surplus and obsolescence and asset sale and disposition. Determine system capital asset information needs and constraints. Determine the hardware and software necessary to effectively manage the system.</p>
<p>Creating the Capital Assets Management System</p>	<p>Adopt a proposal setting up the capital asset system including adoption of formal policies and procedures. Create positions and job descriptions for those with capital asset responsibilities. Design the capital asset inventory database and develop standard forms to match the format of computerized records. Provide training as necessary. Identify specific assets below the capitalization threshold that should be tracked for information purposes and safeguarding. Budget the amount necessary to operate the capital assets management system adequately.</p>
<p>Implementing the Capital Assets Management System</p>	<p>Inform all departments of the requirements, policies and procedures of the capital assets system. Ensure that assets to be tracked on the system have been identified and tagged. Enter information into the capital assets database. Assign appropriate values to the assets in the database. Establish location codes and custodial responsibility for capital assets.</p>
<p>Maintaining the Capital Assets Management System</p>	<p>Enter all inventory information into the automated capital asset system as capital assets are received. Assign tag numbers, location codes and responsibility to assets as they are received. Monitor the movement of all capital assets using appropriate forms approved by designated system personnel. Conduct periodic inventories and determine the condition of assets. Generate appropriate reports noting any change in status of assets including changes in condition, location and deletions. Reconcile the physical inventory to the accounting records, account for discrepancies and adjust inventory records. Use information from the system to support insurance coverage, budget requests and asset replacements and upgrades.</p>

SOURCE: "Getting a Fix on Fixed Assets," City and County Financial Management, Vol. 15 Issue 2, Texas State Comptroller's office May 1999.

**CHAPTER 12
FOOD SERVICE**

The primary mission of a school district’s Food Service Program is to provide an appealing and nutritionally-sound breakfast and lunch to students while operating on a cost-recovery basis. In addition, these meals should be provided to the students in a safe, clean, and accessible environment. Several success factors can be used to measure the efficiency and evaluate the effectiveness of a school district’s Food Service operation. These factors include a high ratio of meals per labor hour (MPLH), minimizing food costs and waste, maximizing student participation in breakfast and lunch programs, providing a variety of meal choices that meet or exceed nutritional standards, reducing the length of time students must wait in line for service, and operating a financially self-sufficient program.

Efficient food service program management and cost controls can allow a district to operate its food services program on a break even basis, thereby preventing the need to use general fund support. Successfully managed school food service programs provide customer satisfaction and contain costs while complying with applicable federal, state, and local board regulations and policies.

The Texas Association for School Nutrition (TASN), a professional organization for school food service employees, has identified 10 *Standards of Excellence* for evaluating school food service programs. TASN states that an effective program should do the following:

- Identify and meet current and future needs through organization, planning, direction, and control;
- Maintain financial accountability through established procedures;
- Meet the nutritional needs of students and promote the development of sound nutritional practices;
- Ensure that procurement practices meet established standards;
- Provide appetizing, nutritious meals through effective, efficient systems management;

- Maintain a safe and sanitary environment;
- Encourage student participation;
- Provide an environment that enhances employee productivity, growth, development, and morale;
- Promote a positive image to the public; and
- Measure success in fulfilling regulatory requirements.

VISD provides more than 1.6 million lunches to its 14,316 students each year. Approximately 550,000 breakfasts are served each year, with a high percentage of those breakfasts being classified as Severe Need. The United States Department of Agriculture (USDA) established severe need funding for breakfast for schools serving a large percentage of needy students. The School Breakfast Program (SBP) regulations specify that eligibility for severe need reimbursement be based on the following criteria:

- Reimbursement rates under the School Breakfast Program are insufficient to cover SBP costs;
- Campus is currently participating in, or desiring to initiate, a SBP; and
- Forty percent or more of the lunches served to students at the campus in the second preceding school year were free or reduced-price meals.

In 2002–03, the VISD schools that met the eligibility requirements for severe need in the prior year received an additional \$0.02 cents for every lunch served and an additional \$0.23 for every reduced-price or free breakfast served.

Currently, there are 15 elementary schools, 3 middle schools, and 2 high school campuses with cafeterias. Chandler Elementary School serves as a finishing kitchen for three satellite kitchens at Mitchell Guidance Center, Profit Academic Center, and the Juvenile Center for Academic Achievement (JCAA). Meals are prepared at Chandler Elementary and are then delivered to Profit Academic Center. Both Mitchell Guidance Center and the JCAA receive pre-packaged meals. **Exhibit A–121** summarizes the number of meals served by the Child Nutrition Department between 1999–2000 and 2001–02. The

**EXHIBIT A–121
VISD CHILD NUTRITION DEPARTMENT MEALS SERVED
2000–01 THROUGH 2002–03**

MEAL	2000–01	2001–02	2002–03	PERCENT CHANGE (1999–2000 THROUGH 2001–02)
Lunches	1,494,285	1,569,077	1,645,146	10.1%
Breakfast (Regular)	517,900	855,856	558,565	7.9%
Average Daily Attendance (ADA)	14,411	14,360	14,438	0.2%

SOURCE: Texas Education Agency, Academic Excellence Indicator System & VISD, Child Nutrition Department, Meal Counts by Eligibility Reports, For the Years Indicated.

number of lunches served has increased by 10.1 percent. The number of breakfasts served has increased 7.9 percent. Between 1998–99 and 2001–02, VISD’s Average Daily Attendance (ADA) stayed relatively constant, increasing by only 0.2 percent.

VISD participates in the National School Lunch Program (NSLP), School Breakfast Program (SBP), the After School Snack program, and the Summer Feeding program administered by the Texas Department of Agriculture (TDA).

VISD’s percentage of economically disadvantaged students, 53.0 percent, is comparable to the state average of 52.8 percent. **Exhibit A–122** compares VISD against its peer districts in terms of the economically disadvantaged students. Bryan ISD has the highest percentage of economically disadvantaged students for the peer group. VISD ranks near the midpoint.

VISD has installed a wide area network (WAN) to connect all of the cafeterias with the central office. Computers have been installed at every campus. The department uses an automated point-of-sale (POS) system from PCS, Inc. Each student either enters his/her identification number on the keypad or runs a card through the card reader, depending on the type of terminal that is present in the cafeteria. The system enables the department to generate reports, track food service sales, and collect student participation data. The district is in the process of updating the software and will be installing new computers and POS terminals over the summer. The new terminals will allow the students to scan their cards. The updated software and new computers will operate a more efficient inventory program and

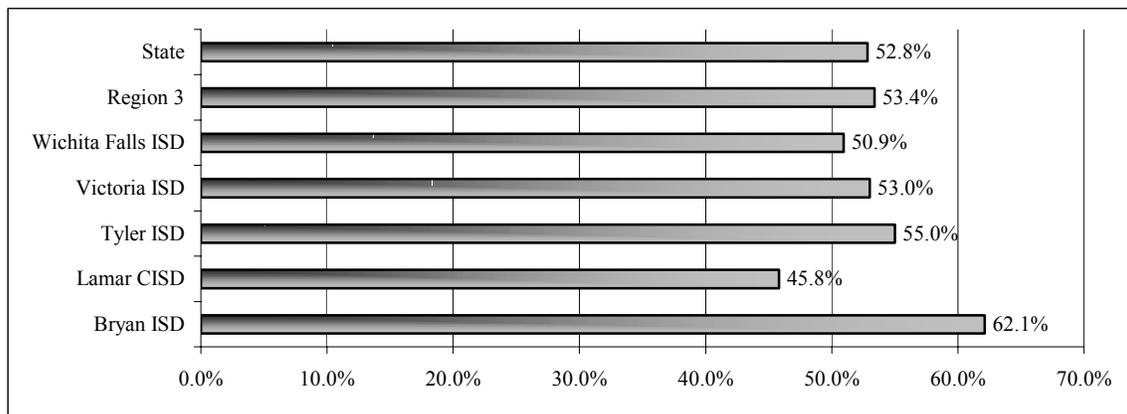
point-of-sale system. Currently, each cafeteria manager enters the food order into the requisition system and a pull slip is generated for the warehouse. However, due to the limitations of the software, each cafeteria manager must also deliver a paper copy of the food orders to the central office for the inventory clerk to enter into the inventory module. Once the upgrade is operational, the data will load directly into the inventory module; this will save travel time and eliminate the current duplicative data entry process.

VISD uses Nutrikids for Windows to help facilitate menu planning. The system breaks down the nutritional value of each ingredient used in each menu item. This helps to ensure that the menu items served to students meet the USDA dietary requirements under the National School Lunch and School Breakfast Programs. The software also tracks the cost of each ingredient and provides recommended portion sizes of each menu item. This helps the district maintain control over food costs.

ORGANIZATION AND MANAGEMENT

The director of Child Nutrition has managed the department since August 1999. Prior to becoming the director, she was the assistant director for three years. The Child Nutrition Department has centralized control of every aspect of the Food Service function, including Human Resources, Procurement, Warehousing, Accounts Payable, and Cafeteria Operations. Each cafeteria manager reports to one of the two supervisors in the department. The daily departmental management duties are split between the assistant director and the two supervisors. The assistant director is responsible for overseeing the warehouse, monitoring food production reports, and assisting with menu planning. He is also involved in upgrading the POS

**EXHIBIT A–122
ECONOMICALLY DISADVANTAGED STUDENTS
VISD VS. PEER DISTRICTS
2003–04**



SOURCE: Texas Education Agency, Public Education Information Management System (PEIMS), 2003–04

computer system. One supervisor is responsible for personnel, training, and updating procedural guidelines. The other supervisor deals primarily with computer problems for the department and the school cafeterias, including training managers on using the POS system.

School cafeterias are staffed with a manager. Additional Child Nutrition specialists are assigned based on a lunch meal-served ratio of 1 to 100. Cafeteria managers are responsible for requisitioning food items two weeks in advance, taking delivery of food items, scheduling staff, and managing the operations of the cafeterias. Child Nutrition specialists have cashiering duties, ensure that each student inputs his/her identification number into the POS, prepare the food, work the food lines, and clean-up the kitchen following meal periods. The school custodians are responsible for keeping the eating areas clean.

The Child Nutrition Department has 168 employees, including regular full-time employees, substitute workers, and manager trainees. The district currently has six manager trainees participating in its manager-training program. Typically, the manager trainees remain in the training program for eighteen to twenty four months before they are qualified to become full-time managers. Chandler Elementary School serves as the district's training kitchen. The district tries to maintain a substitute pool throughout the year, ranging from 2 to 15 substitutes. However, the substitute pool has usually been depleted before the end of the school year. **Exhibit A-123** depicts the Child Nutrition Department organization chart.

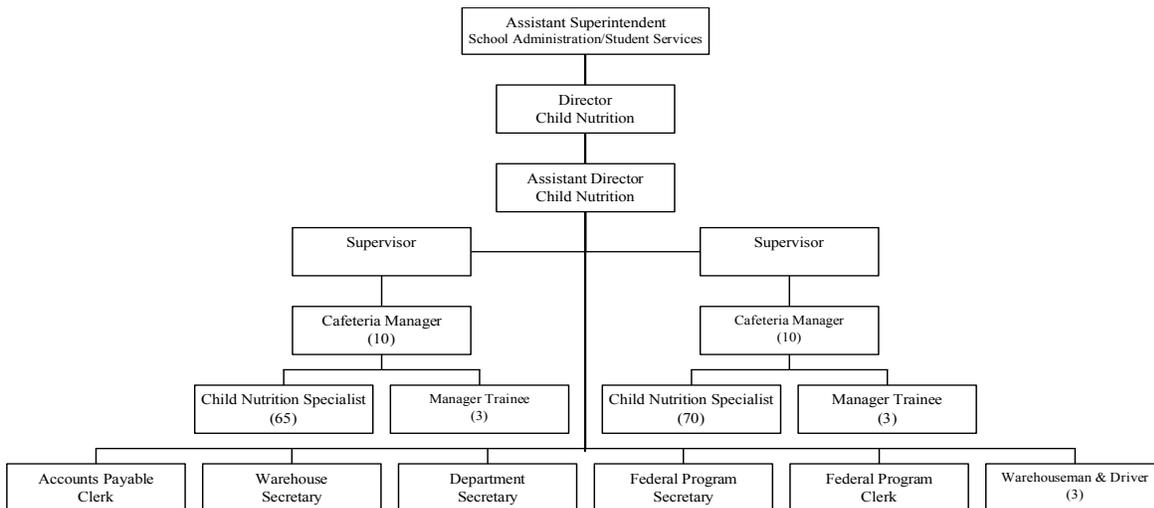
Vendor deliveries are processed through the central food warehouse located just behind the administration building. The items are received by the warehouseman and entered into the inventory by the warehouse secretary. Any items that do not meet the specifications or quality guidelines established by the department are refused and sent back. The acceptable items are then placed on the shelves until the time they are due to be delivered to the schools. All school deliveries are made from the central food warehouse, with the exception of bread, milk, and tortillas. These items are delivered just in time to the schools directly from the vendor. The department conducts a physical inventory at the end of each month.

STUDENT MEAL PARTICIPATION

School districts that take part in the federal lunch program receive cash subsidies and donated commodities from the USDA for each meal they serve. In return, the district must serve its students meals that meet federal requirements for nutritional value and offer free or reduced-price meals to eligible students. As in most school districts, VISD has a higher percentage of students participating in lunch than in breakfast. **Exhibit A-124** presents the 2002-03 reimbursement rates VISD received from the federal government in relation to the National School Lunch and School Breakfast Programs.

All of VISD's campuses are closed, meaning that students are not allowed off school property once classes begin for the day; however, high school students are allowed to move between campuses to take courses. When the high school students leave

**EXHIBIT A-123
CHILD NUTRITION DEPARTMENT ORGANIZATION
2003-04**



SOURCE: VISD, Child Nutrition Department, 2003-04.

**EXHIBIT A-124
REIMBURSEMENT RATES
2003-04**

DISTRICT	FULL PRICE	REDUCED-PRICE	FREE
Reimbursable Lunches	\$0.21	\$1.79	\$2.19
Reimbursable Breakfasts	\$0.22	\$0.90	\$1.20
Breakfast Severe Needs (additional)	\$0.00	\$0.23	\$0.23
Supplementary Lunch (Severe Need)	\$0.23	\$1.81	\$2.21
Snack Program	\$0.05	\$0.30	\$0.60

SOURCE: CNPIMS – Reimbursable Rates, Program Year 2004.

the campuses, they often stop at fast food restaurants and bring the food back to campus, thereby reducing participation in the reimbursable lunch program. There are three lunch periods at each high school campus. **Exhibit A-125** compares breakfast participation rates between 2000-01 and 2002-03. Participation rates have slightly increased but remain very low, with less than one-quarter of the enrolled students eating breakfast.

Exhibit A-126 compares lunch participation rates between 2000-01 and 2002-03. Lunch participation rates have increased by 9.8 percent. However, given the fact that campuses are closed, and the fact that 66.2 percent of the student population is eligible for free and reduced price lunches, overall lunch participation, at 64.5 percent, remains lower than expected.

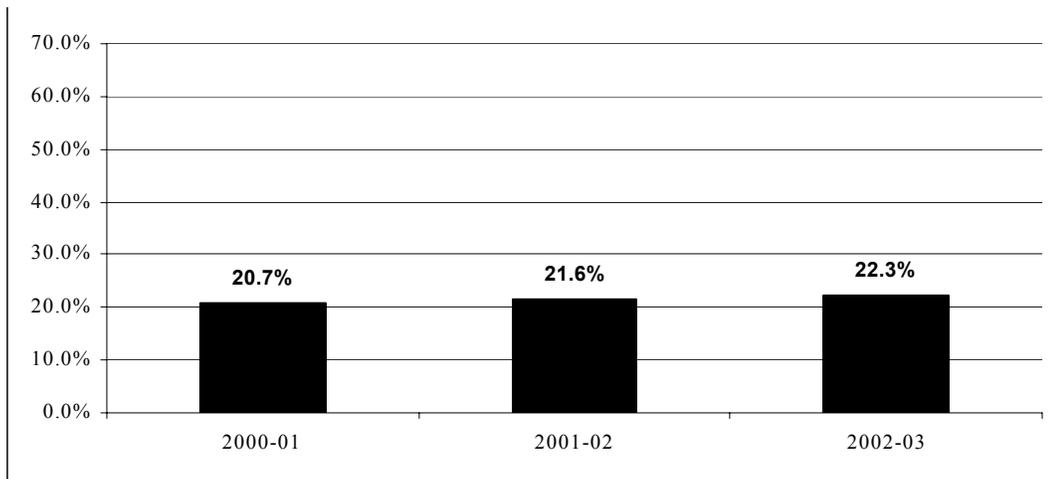
Exhibit A-127 compares meal participation between 2000-01 and 2002-03 for VISD and its peer districts. Breakfast participation is higher in Wichita Falls and Bryan than VISD. However, VISD has seen the highest percentage increase in participation of the peer group. VISD has one of the highest lunch participation rates of its peers, with

participation growing at a faster rate than any of the peer districts.

Meal participation rates vary considerably between elementary and secondary schools, with secondary schools always being lower. There are a number of issues that contribute to low participation rates at the secondary level. The enrollment in each school is substantially higher than the elementary schools, which can increase the time spent standing in line and decrease the willingness of students to eat in the cafeteria. Serving portions can impact participation. If the cafeteria runs out of a popular item, students may not choose the remaining item, thereby increasing food waste and dropping meal participation. **Exhibit A-128** compares participation rates by school type. Secondary school participation rates are far lower than the elementary rates for both breakfast and lunch.

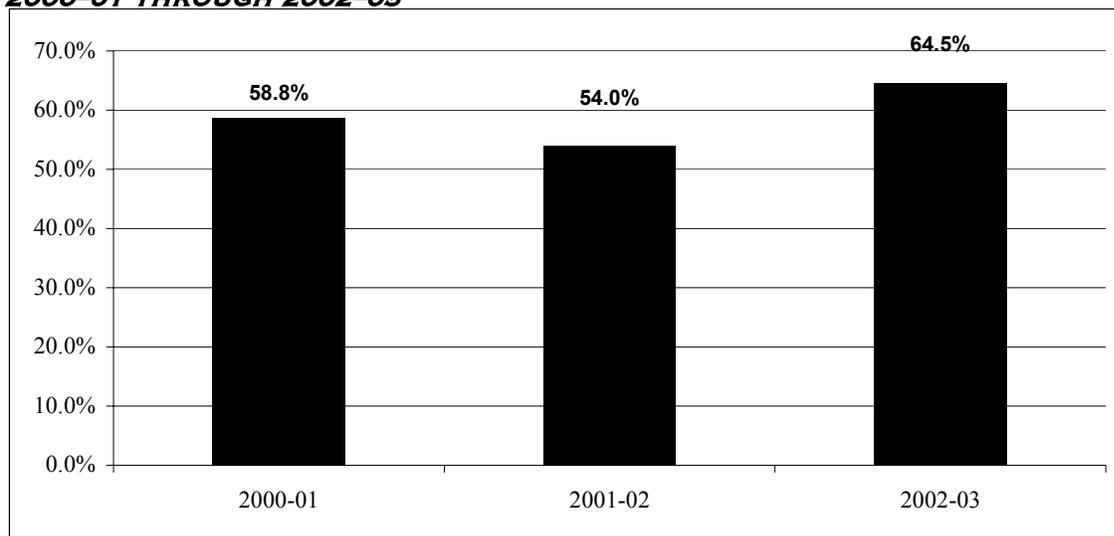
The review team surveyed parents, teachers, principals, and students to ask their opinion about the Child Nutrition operation at VISD. Overall, the responses were positive. The majority of parents, teachers, and principals agreed or strongly agreed that the cafeteria’s food looks and tastes good.

**EXHIBIT A-125
VISD BREAKFAST PARTICIPATION RATES
2000-01 THROUGH 2002-03**



SOURCE: Texas Education Agency, Child Nutrition Reports, District Profile, 2000-01 through 2002-03.

EXHIBIT A-126
VISD LUNCH PARTICIPATION RATES
2000-01 THROUGH 2002-03



SOURCE: Texas Education Agency, Child Nutrition Reports, District Profile, 2000-01 through 2002-03.

However, 64.2 percent of students surveyed disagreed or strongly disagreed. The question pertaining to whether or not the food was served warm received a reasonably favorable response from all groups surveyed. Students surveyed indicated that

there are problems related to the serving times, with 52.4 percent disagreeing or strongly disagreeing that the meal times are appropriate. However, other groups surveyed did not find this to be a problem. Both campuses have three lunch periods, which

EXHIBIT A-127
AVERAGE ANNUAL MEAL PARTICIPATION RATES
VISD VS. PEER DISTRICTS
2000-01 THROUGH 2002-03

YEAR	BRYAN	LAMAR	TYLER	VICTORIA	WICHITA FALLS
Breakfast Participation					
2000-2001	27.8%	22.3%	17.7%	20.7%	31.9%
2001-2002	27.5%	22.2%	16.6%	21.6%	32.1%
2002-2003	27.0%	19.0%	17.8%	22.3%	29.1%
Percent Change (2000-2003)	(2.90%)	(14.80%)	0.60%	7.70%	(8.80%)
Lunch Participation					
2000-2001	70.0%	58.7%	49.0%	58.8%	63.4%
2001-2002	69.4%	60.1%	47.9%	54.0%	59.8%
2002-2003	64.7%	54.5%	51.0%	64.5%	57.3%
Percent Change (2000-2003)	(7.6%)	(21.5%)	4.1%	9.7%	(9.6%)

SOURCE: Texas Education Agency, Child Nutrition Programs District Profile Reports for VISD and peer districts, 2000-01 through 2002-03.

EXHIBIT A-128
MEAL PARTICIPATION RATES BY SCHOOL TYPE
2003-04

SCHOOL TYPE	BREAKFAST PARTICIPATION	LUNCH PARTICIPATION
Elementary	27.5%	63.7%
Middle School	11.9%	49.8%
High School	5.3%	25.7%

SOURCE: VISD Child Nutrition Department, 2003-04 Employee Schedule and Financial Reports Meal Counts by Day.

provides students with enough time to eat without overcrowding being an issue. A little over 50 percent of the students also indicated that they spend more than 10 minutes in line. However, during the site visit, the review team observed lunch periods at both campuses and did not see this to be the case. The serving lines moved freely and efficiently. None of the other groups surveyed identified serving times or excessive waits in line to be an issue. **Exhibit A-129** summarizes the survey responses to these four questions.

VISD receives donated commodities from the USDA. The state of Texas provides slightly more than 1 percent of the total revenue received. Local sources, including the cost of adult meals, a la carte sales, and special event catering, account for approximately 32.6 percent of the Child Nutrition revenue.

The VISD Child Nutrition Department has shown an operating profit three of the last four years. During this period, food service fund balance was used to purchase equipment in 1999–2000 and offset

**EXHIBIT A-129
FOOD SERVICE SURVEY RESULTS**

SURVEY STATEMENT	SURVEY RESPONSE			
	STRONGLY AGREE/AGREE	NO OPINION	DISAGREE/STRONGLY DISAGREE	NO RESPONSE
The cafeteria’s food looks and tastes good.				
Students	15.0%	20.9%	64.2%	0.0%
Teachers	44.9%	20.3%	34.8%	0.0%
Parents	49.4%	15.5%	35.1%	0.0%
Principals and Asst. Principals	51.3%	5.1%	43.6%	0.0%
Food is served warm.				
Students	37.9%	27.3%	34.7%	0.0%
Teachers	66.5%	19.5%	14.0%	0.0%
Parents	62.6%	19.8%	17.2%	0.4%
Principals and Asst. Principals	79.5%	7.7%	12.8%	0.0%
Students eat lunch at the appropriate time of day.				
Students	31.0%	16.6%	52.4%	0.0%
Teachers	64.4%	5.1%	30.5%	0.0%
Parents	43.4%	6.3%	50.3%	0.0%
Principals and Asst. Principals	94.8%	2.6%	2.6%	0.0%
Students wait in food lines no longer than 10 minutes.				
Students	31.6%	17.6%	50.2%	0.5%
Teachers	60.6%	15.7%	23.7%	0.0%
Parents	45.7%	17.2%	37.0%	0.1%
Principals and Asst. Principals	94.9%	2.6%	2.6%	0.0%

SOURCE: VISD TSPR Survey Responses, April 2004.
*Totals may not add due to rounding.

FINANCIAL MANAGEMENT

The financial management of Food Service operations has become a major emphasis of school districts nationwide. Food Service operations are expected to be run like a business and be self-supporting. To successfully manage a financially successful school Food Service operation requires a knowledge of the financial goals and objectives of the school board; sound planning and budget development to meet the board’s goals and objectives; and a financial accounting system that provides accurate and timely financial information to assist in managing revenues and expenditures.

The Child Nutrition Department receives funding from a number of sources. Federal reimbursement dollars make up the majority of the Food Services Department’s revenue, comprising just over 66.4 percent of all revenue received. In addition to federal reimbursement dollars from the NSLP and SBP,

operating losses in 2000–01. Local revenue has decreased by 6.7 percent, while federal revenue has increased 12.1 percent. This trend can be attributed to an increase in the number of students that are eligible for free and reduced price meals. **Exhibit A-130** summarizes the actual revenue and the expenditures from 1999–2000 through 2002–03. The district has increased expenditures during this period by 1.4 percent. However, there has been very little investment in equipment. Indirect and utility costs are budgeted every year and transferred to the general fund.

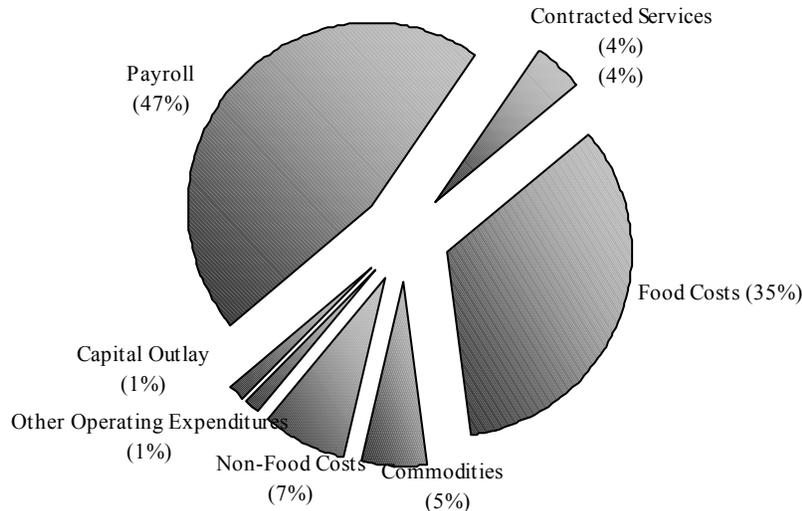
The majority of a district’s Child Nutrition annual expenditures are in payroll costs and in the cost of food. **Exhibit A-131** illustrates the breakdown of expenditures by object code or category for 2002–03. Food costs comprise about 35 percent of the department’s operating budget, exclusive of commodities. Payroll costs account for 47 percent of

**EXHIBIT A-130
VISD CHILD NUTRITION DEPARTMENT
ACTUAL REVENUE AND EXPENDITURES
1999-2000 THROUGH 2002-03**

REVENUE AND EXPENDITURE CATEGORIES	1999-2000 ACTUAL	2000-01 ACTUAL	2001-02 ACTUAL	2002-03 ACTUAL	PERCENT CHANGE FROM 1999-2000
Local	\$1,665,472	\$1,586,061	\$1,594,960	\$1,554,217	(6.7%)
State	57,347	57,100	52,990	51,276	(10.6%)
Federal	3,054,807	3,045,739	3,229,303	3,424,068	12.1%
Total Revenues	4,777,626	4,688,900	4,877,253	5,029,561	5.3%
Payroll	2,131,239	2,212,947	2,221,099	2,219,922	4.2%
Contracted Service	331,788	259,070	233,750	210,733	(36.5%)
Food and Supplies	2,252,824	2,270,189	2,107,542	2,296,432	1.9%
Other Operating Expenditures	26,279	22,749	26,973	68,263	159.8%
Total Operating Expenditures	4,742,130	4,764,955	4,589,364	4,795,390	1.1%
Operating Profit (Loss)	35,496	(76,055)	287,889	234,171	
Capital Outlay	58,350	7,477	28,043	72,193	23.7%
Total Expenditures	4,800,480	4,772,432	4,617,407	4,867,543	1.4%
Net Profit/Loss	(\$22,854)	(\$83,532)	\$259,846	\$161,978	

SOURCE: Texas Education Agency, PEIMS, 1999-2000 through 2002-03.

**EXHIBIT A-131
VISD CHILD NUTRITION DEPARTMENT
BREAKDOWN OF EXPENDITURES
2002-03**



Source: Texas Education Agency, Public Education Information Management System (PEIMS), 2002-03.

the department's operating budget. Non-food supplies include the disposable serving items used daily in the cafeterias and comprise 7 percent of the department's operating budget.

Exhibit A-132 compares 2003-04 VISD budgeted expenditures against its peer districts. VISD had the smallest operating budget of the peer group. The largest components of the operating budget are payroll and food costs.

EXHIBIT A-132
FOOD SERVICE BUDGET COMPARISONS
VISD VS. PEER DISTRICTS
2003-04

EXPENDITURE CATEGORY	BRYAN	LAMAR	TYLER	VICTORIA	WICHITA FALLS
Salaries and Benefits	\$3,194,483	\$3,680,583	\$2,214,102	\$2,433,421	2,418,392
Contracted Service	117,619	318,575	31,373	147,000	222,800
Food and Supplies	2,374,236	3,512,525	3,223,000	2,288,500	2,592,200
Other Operating Expenditures	187,466	8,026	9,500	25,500	49,600
Capital Outlay	0	0	16,000	8,000	110,400
Total Expenditures	\$5,873,804	\$7,519,709	\$5,493,975	\$4,902,421	\$5,393,392
Salaries and Benefits	54.4%	48.9%	40.3%	49.6%	44.8%
Contracted Service	2.0%	4.2%	0.6%	3.0%	4.1%
Food and Supplies	40.4%	46.7%	58.7%	46.7%	48.1%
Other Operating Expenditures	3.2%	0.1%	0.2%	0.5%	0.9%
Capital Outlay	0.0%	0.0%	0.3%	0.2%	2.0%
Enrollment	14,104	17,724	17,273	14,316	15,035
Expenditures per student	\$416	\$424	\$318	\$342	\$359

SOURCE: Texas Education Agency, PEIMS, 2003-04.

COMMUNITY OPEN HOUSE COMMENTS

As part of Victoria Independent School District (VISD) performance review, community open houses were held at the board room in the administration building and the library at the Memorial High School senior campus on Monday, April 19, 2004. Members of the public were invited to record their comments regarding the VISD education system. Community members and school staff who participated attended the community open house gave their comments about the 12 areas under review.

These comments illustrated community perceptions of VISD and do not necessarily reflect the findings or opinion of the Legislative Budget Board or review team. The following is a summary of comments received by focus area.

DISTRICT LEADERSHIP, ORGANIZATION, AND MANAGEMENT

- The leadership of this district (board, superintendent and staff) do not seem to be focused on academic excellence. The school principals need to be held accountable for the performance of their students on standardized tests. The board does award students with the “Top 5” awards, and this is a very good program. Chandler Elementary is an excellent school and an example of what can be done in this district – the credit for this should go to its principal and staff. Howell Middle School has not been as good of an experience.
- I am disappointed in the district leadership, from the top down. I feel, at the middle school level especially, there is little accountability for the principal, and even less accountability required by the principal of the teachers. I am concerned about the structure of the high schools as well; it seems to be geared for non-college bound students. Every child should be on track for college! The district needs to emphasize excellence in academics and quit focusing on golf and football. Sports are great and fun, but after high school it’s over! Chandler Elementary is an excellent school with an exemplary principal! Regrettably, Howell Middle School has not provided us with the education and disciplined environment we had hoped for.
- I am President/CEO of the Victoria Chamber of Commerce. The Chamber has recently established an Education Coordinator position (first year partially funded by TBEC) to address educational attainment rates in our region. Specifically, the Chamber has issues with test scores and discipline issues. As a parent of three

children in this district, I personally have experienced an excellent educational environment at Chandler Elementary and a very disappointing environment at the middle school levels. I don’t think it’s the teachers, and I don’t see that our students in 5th grade should differ that much from 6th grade – so I think it must be an administrative issue.

- I can’t get in to see the assistant superintendent. You have to talk to his secretary.
- Our school board has really let the community down. Major concerns are put on the back burner and it seems lately all they want to do is hire outside consulting firms. Our high school is a mess and this needs to be addressed now. Turnover in administrators is unbelievable. We have too many chiefs trying to run things. We need strong leadership that will take control and make some positive changes. Our site-based teams are not allowed to do the type of job they want to do – they make recommendations and then the administration just does what it wants to. Teachers are kept in the dark on many important issues. Good leadership begins at the top. Maybe it is time to look at those who are supposed to be managing VISD.
- The site-based team was asked to sign off on next year’s budget before it was presented. Many people did not sign off on it, and changes were made but not discussed. It has become a nothing group – ineffective. Part or most of this is due to the campus leadership. Strategic Planning is a hurried affair with items on it that are outdated, or for show. I don’t believe most of the staff is even aware of what the plan looks like. We need effective leadership at both the board and the superintendent level. Most are well-meaning, but the board’s major priority is money and the superintendent has a go-along/get-along attitude. The board makes policies that they do not monitor for compliance – i.e., the dress code, etc. and the superintendent seems to fold when confronted by parents.
- Please, please check into the activities of the assistant vice principal – I have experienced racial prejudice (he is black and I am not). He is unprofessional, and treats parents and children unfairly. I reported him to VISD, but I don’t feel it has been recorded. Please also check on the Chemistry teacher at the senior campus; she also has been found to treat parents and children in an unprofessional manner.
- It appears that the board is not paying attention to the entire district, but only focusing on the high school, and a full agenda for re-

configuration. In the meantime, the middle schools are failing. I firmly believe that a drop-out occurs well before the 9th grade.

- The decision-making process doesn't appear to be managed by the entire group: "An administrator says," "the superintendent said," "the Board says the idea came from the Super," ... on and on. One can never hear a straight answer, or for that matter, the same answer. It is my belief that perhaps those "in charge" don't really understand what they are "in charge" of.
- There appears to be a real problem between the school board and superintendent and administration. I would say a lack of leadership from the administration – I'm not sure if it is due to inability or fear. When you ask why certain things are not brought up, the response is that the board didn't ask for them. Little attention appears to be paid to educational merit when changes are brought forward.
- The site-based management process is not effective. There are people on these teams that want to effect change; however, little true work is done. It's primarily a rubber stamp for what the principal says – no creative problem solving is encouraged. We meet too infrequently for real work, and communication about meetings is poor.
- The school board has spent the past two years focused on high school at the expense of the other grades. The middle schools are suffering – the dropout rate and test scores are a direct result of this lack of focus. When the kids leave elementary, test scores are good – they start dropping in 6th and continue going down. If we fix it in middle school, we won't have the high school problems.
- I feel that the superintendent should visit the various campuses more often and actually experience hall and room behavior. I think he is out of touch with the way our district is declining. Committees are formed, work is done to get ideas from teachers and community, and then nothing is done to follow through with committee suggestions.
- Site-based management is a great idea. Unfortunately, it does not work at VISD: there is no oversight.
- Our administrators are not spending enough time listening to the teachers on campus. The site-based teams are not an active unit on most campuses, they are merely a rubber stamp for what the principal or other administrator wants to happen. Therefore teachers are frustrated because no changes or problems are truly

addressed. I have served on a committee at both the junior high and elementary level so I personally know this is a set pattern. If the administration would hold an open forum on campus between the faculty and superintendent, perhaps they would hear what real concerns we have. They don't, for fear of a deluge of complaints, but some positive exchanges would come from listening to our concerns. Our campus has held parent and faculty open forums to increase communication. When has the administration directly asked the teachers and educators who deal with day-to-day problems what can be done to help improve our campus? We feel, as educators, disenfranchised from the process. That's why I came to the open house: we as teachers need something done.

- Principals govern teachers and staff. Superintendent needs to govern principals and correct problems. School board needs to govern the superintendent. A chain of command is needed and needs to be created and followed.
- Our school board appears obsessed with restructuring schools. They spend their time, the administration's time, district resources, and even residents' time to develop support for their preconceived position.
- Our school board is too involved in places where educational professionals have the better expertise and training. Board members assign work to the administration and then put themselves on the study committees. Many board members are not trained educators. Further, the presence of board members in study groups must surely restrain the creative thinking and work of qualified professionals who work at the pleasure of the board members.
- This district has drug problems, discipline problems, and some teachers with serious morale problems. In any industry, these issues are failures of management. VISD management, both paid and elected, should put more focus on resolving these issues. Progress comes through effort, not excuses.
- We must develop a new view of the importance of education. Personal success today frequently requires post-high school education. Our district should have significant, consistent, long term programs supporting college completion directed at the parents of students.
- I feel the state's daily payment for student attendance encourages this district, and many other districts, to force unwilling students to remain in schools. Unwilling students are likely disruptive to others and are not usually

interested in learning. Yet, the districts seem compelled to tolerate their disruptive influence in order to earn the daily payment from the state.

- The superintendent is the leader who sets the tone of the district. With everyone from the superintendent to the custodial staff working cooperatively on problems, a lot can be done. There has to be an understanding that anyone can criticize constructively and make suggestions. That is not the case here. Past dealings with the administration and the school board have caused staff and parents to be cautious. The administration needs to listen to parents and staff to find out the facts before making decisions. They need to support the staff and not bend and waffle with every threat and conflict. When information passes freely from the schools and the public to the central office, then problems can be assessed.
- I have lived here 34 years, have taught in public high schools for 32 years, and had two children graduate from high school here. I retired last year. This is a nice size city to live in and the school district should be managed smoothly with the right leadership. We need brave, caring, forward-thinking leadership.
- I prefer to keep the present high school arrangement. This is one thing that attracted us to Victoria. In many communities, this becomes a divisive issue that festers for years as smaller communities lose their high schools through consolidation. The solution Victoria chose was creative and serves to promote equality across the board.
- I want to give high marks to the principal at Howell for his management by walking around. Maybe this has the appearance of less than what an administrator should do but he personally makes time to connect with the students. His interaction with students as part of school management makes a difference. It is easy to stay shut up in your office but he does not do this and it makes a difference. This practice allows him to anticipate and defuse problems, get assistance for students who need it, and stay in touch with his customers. He knows his students and they know him.
- The school board has completely failed in expecting and demanding excellence out of the existing facilities. We have had a board that for 3 years has put out fanciful plans on schools and educational systems that have no history of success. If only the same amount of effort was put forth in demanding results from the existing system. What's wrong is the low expectations

placed on students and staff and the use of these low results to try to justify a school system we do not need and cannot afford.

- There is no reason Victoria could not have two schools of 4A size. The southern high school building could be sold because the city has had problems with it continually. It is in a recreation business area and is built with dangerous features. There is land in the western part of the city. Building a high school there would allow the city to be split in an east/west manner. In the past the city was split north/south and it never worked. The interest rates are low now and land is available. With cooperation from developers, businesses and wealthy landowners, a reasonable compromise could be found. Our high school students are being denied the activities they deserve to have. There is no good reason for keeping one large high school.
- The high school is a travesty for the students. The two buildings are too far apart (over a mile) to be safe to walk between. Spending money on bussing between classes to the campuses and city wide to each building is a waste of precious money. There is no feeling of being a family when 9th grade through 12th grade are not on the same campus.
- The students and parents have not tried to promote two schools because the move to one school was heart-wrenching for the community. Bad feelings developed which will be hard to heal. Some people have moved their children to other school districts. The few students who can participate will not gripe about one school and those denied have given up. The community is ignoring the high school problem.
- There are major leadership and management issues at the Stroman campus. Vice-principals who don't return parent phone calls regarding teacher problems, substitute issues and serious student issues (stalking) have completely eroded my confidence and comfort level with that campus.
- Mitchell Guidance Center should receive a principal with a communications ability versus pomposity.
- Administrative, superintendent, assistant superintendent, principals, assistant principals, vice principals, and teachers need capability evaluation immediately. The MHS assistant principal's office should be secretly taped to show total disrespect for both students and parents. Arrogance and pompous displays toward parents is rampant. Parental involvement is discouraged and ignored. Disability testing

requested by parents should be automatic. District is in violation of a multitude of IDEA amendments and regulations.

- VISD has many excellent teachers and principals. There are some areas that need improvement. With the right kind of forward-thinking administrative leadership it could be much better. My writing this letter is risky but I care about public schools and come from a family background that believes a solution to any problem can be found if an attitude of caring for everyone is used. We are only as strong as our weakest link. Hurting others hurts all of us in the long run. The public schools face obstacles that other schools do not face.

EDUCATIONAL SERVICE DELIVERY

- I have a problem with the hiring of substitute teachers who come into the classroom and teach anything but the subject. There was recently an incident at the Stroman campus where a substitute spoke the whole class trying to convert the kids to Christianity – and she didn't even do it in Spanish!
- There are no special classes at the high school level for GT students. Anyone can take AP classes. At Dudley, the GT kids are mixed in with problem kids in hopes to change those kids.
- We are losing a lot of good teachers in the high schools.
- Homeroom class is a joke! They do nothing in that class!
- They need to have students' schedules prepared in advance. Don't wait until the 1st day of school to start the distribution!
- I am concerned the curriculum does not do a sufficient job of preparing students for college. The Block system does not establish a regimen to aid the students in a college setting. My son graduated from MHS in the top 10%, taking all Pre-AP and AP classes, and found college (A&M) a very difficult transition (along with other classmates). Many have since dropped out of the larger university and had to transfer to Victoria College or other smaller universities. Has this been researched?
- My junior at MHS complains his AP classes have students who are not performing at the appropriate levels, slowing the whole process down for the teacher. I believe we have very qualified teachers who are not being given the opportunity to teach the curriculum they need for these students to succeed at the universities.

- I have two children who are graduates of VISD and one currently attending, all of whom have taken advantage of the Pre-AP and AP classes. I have a problem with teachers not teaching the kids the things they need from the class, i.e. three years of Spanish and they can't speak Spanish. There is too much time spent every year on the food and Day of the Dead; spending half of the semester on the Science Fair and not on the much-needed Chemistry.
- Student performance is low. TAAS scores merely reflect how well we teach and organize the test. 9th and 10th grade students cannot read at a 3rd or 4th grade level. Much of the classic literature is taught through video. Curriculum is not vertically aligned: middle school literature classes have the same works that high school literature covers. Someone is teaching *Romeo and Juliet* in 5th grade – there is no graduation of skills taught. The same language skills are repeated year after year, and the majority of 9th grade students cannot write a complete sentence or know the parts of speech.
- There are no counselors for GT students beyond “general” counseling. The College Center only helps low-end students get to VC and auto-admits to state school. They don't have “time” to help most students. This limits the opportunities for out-of-state and private schools.
- Block system is a big negative with regard to AP classes – students finish class in December and take the AP exams in May. The block system creates bad scheduling. A child may end up in Spanish I fall of 9th grade and not have Spanish II until spring of 10th grade. They are sometimes not enrolled in Math or English during PSAT and TAKS testing periods. A lot of “AP Lite” classes have been created that do nothing but inflate GPA's. GPA's are not reflected in low SAT scores. The system is just not set up for high-achieving students.
- The 2 campus system at HS hurts advanced students who must travel back and forth between campuses and are late for classes. If a class is offered at both campuses they may not even cover the same material.
- Magnets do not follow through on themes. The IBO program has not materialized after 3 years and a big grant. Ditto the “Montessori” middle school theme.
- Student performance on the TAKS test has not been what it should be at the high school level. Performance levels have fallen since the consolidation of Victoria and Stroman high

schools. Classes are overcrowded and not enough textbooks are available for all courses. There are not enough inclusion teachers. The curriculum is being watered down.

- I would like to see some attempt made to group students of similar abilities and motivation into classes together, e.g. there is no prerequisite grade level for incoming freshmen who want to take pre-AP classes. Each class has more than one student who struggles with the coursework because they didn't have a sufficient background to be successful. This requires additional attention from the teacher and holds back the students who were prepared properly for the class.
- GT in this district is a sham! The elementary magnet students receive no support once they leave. The junior high curriculum is as much as 2 years behind where the GT magnet leaves off. The students are forced to read and do mathematics at a lower level unless they can test out. Then they must choose between activities at junior high like student council or athletics or taking their math at the high school. No other students are forced to make this choice.
- The "enrichment" for GT at middle school is limited. Only 1 junior high has FPS and Math counts. At high school it is even worse. All AP classes are open enrolled. When students are not performing at the proper level the standards are dropped instead of weeding out the low performers. The students are not taking AP exams, and when they do, they score low on them.
- Foreign language (Spanish in particular) has been a disaster. Why is it that students can take 3 full years and not understand a word of it in conversation? Be completely unable to exchange even the most basic of greetings? It has been taught to my children over a period of 10 years in junior high and high school without any expectations or results. It seems to be a class to satisfy a requirement versus any constructive learning experience. Cooking, Day of the Dead, and custom studies are worthless without learning how to speak, write, listen and read!
- The chemistry and science at Stroman is seriously defective in several classes for any student needing a background in these subjects.
- I do not feel that my son is getting an education. Too much is focused on the laws and not enough is focused on the basics. Teachers do not make it interesting for students to come to school. Students do not want to come and learn.

- Far too much educational time is lost to extracurricular activities, tests, and out-of-class nonsense. R-rated and irrelevant movies are shown on Friday as a "reward" for good behavior.
- The regular classes should be considered remedial.
- There is no attempt at interdisciplinary teaching. Accelerated block makes this almost impossible.
- Students do not do homework or outside reading assigned and yet they somehow pass. Many teachers give "extra credit." Some give the answers on Thursday and test on Friday after a review and forty-five minute study period.
- Counselors are also overloaded with students and unable to address their needs effectively.
- Counselors have "too many" students. It is hard for students to get appointments. There is talk of undoing the current plan to have one counselor for all four years. My child has had three in four years. Lack of continuity is detrimental.
- The counselors need to be there for the average students as well as the kids with problems. Both groups need help.
- There needs to be a dress code for each school level. The administration seems to think that one code for all grade levels works. It may be simple but it does not make sense. High school students need to dress neatly, not expensively, for future jobs. Middle school students need to dress neatly as blossoming young adults. Elementary students have several stages of development to address with a dress code. Some of the current rules allow too much exposed skin from neck to knee and too much tight clothing. There are ways to help students who need clothes. Parents continually gripe when the code tries to become less sloppy and skimpy. The public schools are hampered in handling this problem.
- Special Ed students are given the answers, given grades, or expectations are lowered. Their diplomas are meaningless.

- I am concerned about what is happening between elementary school and junior high school. Students appear to leave elementary prepared but we seem to lose them in junior high. I am concerned about students who are falling through the cracks. For example, as a person who works with children I am seeing more students who are not receiving the help they need. These children are falling behind and we are not helping them. I would like to see a mentoring program started to help these students succeed. We need to start working on our problems before they reach high school.
- I believe my child's grades are not being graded according to what she actually makes. Several times I have confronted her teacher because I have found questions marked wrong when in actuality they are indeed correct [an example was attached]. The teacher's response was that she was in a hurry and at her child's volleyball game. My child feels like a failure receiving such grades when in reality she is passing with great grades. All it takes is one teacher to make a child feel unworthy and undeserving, and then we wonder why kids drop out of school. This needs to be stopped. I do not pay school taxes for the school district to degrade my child.
- Extracurricular activities suffered greatly when our high school was formed by consolidating two 4-year high schools. Participation levels are cut in half, possibly more. This issue will not be addressed well enough until another high school is created. Extracurricular activities are sometimes the only event in school that keeps the at-risk in school and inspires all to excel. We need more of this.
- I feel that VISD is one full year (academically) behind the better districts, such as Cy-Fair in Houston Texas. This is true from elementary to high school. The middle schools offer less courses for high school credit (they only offer 2), and there is less chance at the high schools here to get ahead at the college level. I am very disappointed in the Gifted and Talented program at Howell Middle School. My child has not been challenged and feels that if he returned to our previous school in Houston, TX, that he would have trouble competing. This is sad when a student realizes this!
- Howell Middle School had to discontinue PE at the beginning of Dec. 2003 due to their inability to control the students! There is a serious, serious discipline issues here! Our children need PE!
- There seems to be no motivation by our middle and high school campuses to achieve a higher standard on our TAKS tests. These things begin with the superintendent and filter down. We need strong leadership. Elementary schools such as Chandler are a shining example of leadership and motivation of the teachers and students.
- School principals and staff should be accountable for academic excellence in their schools. One measure of this is the standardized test scores like the TAAS or TAKS scores. These test scores are a reflection of the academic achievement of the students.
- Many of the students that have the means are opting out of the schools in VISD to attend private schools. The draw at the private schools is discipline, safe environment and academic achievement! These are things that VISD should focus on but does not!
- Title IX Extracurricular Activities – VISD has donated to them, and in storage, a brand new scoreboard for the girls' softball field. This field's monies were lost. The field was not built with the money sanctioned for it. This is a violation of Title IX. The boys' scoreboard is up!
- Special Ed is where VISD is lacking. My child has fallen through the cracks. Her basic health needs were not being met. She was getting her pull-up changed once between 8 and 2 in the day. She went an entire day without being given her juice. There have been several days in a row that she hasn't worn her glasses – she is legally blind. I asked the principal about testing for NCLB when she hit 3rd grade. The response was "We just don't know how to test those kids." Speech therapy didn't see her for 6 months, I found out from the Commission for the Blind, which is funny because I was still getting evaluations signed by the therapist. They have yet to work on TEKS curriculum.
- When the outcome of the Smith Elementary Science Fair was publicized, I could only compare it to the situation that occurred in Houston, Texas, in 1997. Wanda Holloway, the so-called "Cheerleader Mom," was jailed for trying to hire a hit man to kill the mother of her daughter's cheerleading rival. Secretly recorded tapes of Ms. Holloway asking her brother-in-law to hire a hit man to kill the mother of a girl who was vying against her daughter for a spot on the cheerleading squad were found. Ms. Holloway said she wanted the mother killed because she believed that the daughter would be so upset that she would drop out of the competition. Witnesses described Ms. Holloway as a vindictive mother who was overzealous in

pursuing her daughter's dreams. Both girls were 13 at the time.

- The cluster method of grouping grade levels in middle school is a great invention. Parents can visit all teachers together. It helps a large school function as a family group.
- The cost is higher so we had to drop art as an elective in 6th grade and other electives in 7th and 8th grades. That is a great loss for students. 8th graders have been short electives. Some great activities are done in art and other electives.
- For the academic students there is limited opportunity for awards and scholarships because of having only one school. The UIL academic and sports opportunities are also cut in half. No matter how large the school is, there is only one team of each sport and activity. Having one 5A school denies too many students participation in important activities. There was pressure from selfish interests to make one high school.
- There is favoritism at Smith Elementary.
- Special Education (learning disabled and ADHD) shows poor communication. A child was truant for two days, in an abandoned house with a group of 6 boys (aged 14-16) and 2 girls (aged 14 and 15), and had sex with at least one boy. The children were found and returned to the school by SRO and placed in ISS – their parents were never notified of the situation or ISS placement. This child was removed from the school by the parent in order to avoid paying fines for her truancy and in order to insure her safety.
- Students are allowed to leave class and no one is calling home. There is an automated phone system that is faulty. There is also a problem with the way teachers report absences to the office.
- Children at school are downloading music, some of which is pornographic and to which most parents would object. Check to see if the district has filters.
- Parents are allowed to roam halls with no notification.
- My daughter is in after-school programs but I never see her work.
- IEP charges without authorization. There is no oversight of site-based management at Stroman.
- More than once my child has come home and described the day's teaching through the classroom practice of watching a Disney movie. The use of *Pocahontas* for teaching American history is a good example. If you are not outraged and offended by this, then the

dumbing down of America is what we all deserve.

- My child could not be at school for the first day of class due to family medical reasons. We did inform the school staff prior to the first day. Imagine my surprise when it took all day when she arrived on the second day to get a schedule. She spent most of that day in the library. Lo and behold this school system has a rule that you lose your planned class schedule if you are absent on the first day of school. So she lost an academic course and got assigned to the office in place of a class. Why is she in school? If it is to learn then what message did you just send her? And where was the staff when we advised them of her late arrival and no one told us of this rule?
- Smith Elementary's very first Science Fair was not "fair" at all. According to Webster's Dictionary, the meaning of fair is "clean, pure, just, conforming with the rules, promising, likely a chance of winning." This is impossible when the father of a student is chosen by the school to be a judge in a fair where his child is competing with other students. A project was mandatory for all 5th graders. Of course, his child is a 5th grader. This contradicts Webster's in that it is a complete opposite of conforming with the rules. Those of us who have morals and values as adults would have common sense to turn such an invitation down because of the issues involved. In the same sense, teachers and administrators should have had the same courtesy in asking other qualified judges with absolutely no ties to any of the students. The meaning of "just" is morally or legally right. Again, another rule broken. How can teachers and administrators allow this to happen? The Smith Elementary Mission Statement reads "We will provide a quality education resulting in motivated, well-nurtured, successful individuals ready to excel in a 21st century multicultural environment. This will be accomplished through a dedicated staff who encourage lifelong learning ..." Nowhere does it say that the individual student will succeed through the "who knows who" concept, as implied by the school principal. A dedicated staff would not evaluate the situation and answer with "that's life." They state that "The students, parents, staff, and community members of Smith realize it takes all of us working together to assure that all Smith Eagles have an equal opportunity to "Soar to Success." Furthermore, "Our school mascot, the Smith Eagle, represents the academic heights we want all our students to attain and the pride with which we approach

each step of the learning process.” Apparently, the approach taken in this situation is in doubt and most would agree that it is not anything to be “proud” of. All students in this situation did not have an equal opportunity. It is very unfortunate that this happened at the expense of other students and VISD. This is the 21st century indeed and instead of giving kids a well-rounded, quality education, officials are teaching these kids that cheating and dishonesty is a way of life and if you are involved in these tactics, you will go further in life. These are the kids who will someday rule and make important decisions for our country. If this continues, corruption and deceit will only be added to our country. Where will it end?

- I honestly feel that aides should be rotated and not with the same teacher for years and years. This would be beneficial in many ways. A different perspective could come about. Children should not be with the same teachers for years either.
- As a person, a parent, and just individual, I would like to express my disappointment with Smith Elementary’s principal, teachers, and parents. The school recently held its very first Science Fair which I believed was to help educate, interest, and motivate the students into the many different science fields. The only moral the students actually learned was that nothing is good enough for some parents to give to their kids. Some parents will go to great lengths and extents to make sure their child goes to the top, no matter who or what they trample over. Prior to the fair, concerned parents inquired about the integrity of the judges and were assured by teachers in charge that the judges were not in any way linked to any of the students. A panel of judges was selected by the school to score the students’ work. Unfortunately, there was only one parent in the twelve members of the panel of judges. I can’t seem to understand how a school would be so unprofessional as to ask a parent to participate in something that would jeopardize his integrity and raise doubts to those who entered and followed all the rules. On the same thought, I suppose a parent would do anything possible, even if it meant risking their own reputation, to accept the position of being involved in making a final decision in a school function. I highly doubt that the Science Fair would not have gone on smoothly without a single judge being omitted. The tragic part of this is that school authorities do not see anything troubling or twisted in the matter. If this is happening at the

elementary level to this degree, it will only get worse and worse as time progresses.

- During the fall of 2003 our son was taking a regular computer science class and pre-AP Biology. During the first few weeks of the semester the computer science teacher lost control of the class. Several kids were being disruptive and did not mind the school’s reprimand process, which was supposed to stop kids from disrupting the class. At the end of the fourth week, we transferred him into another computer science class, and because of scheduling problems, he had to switch biology teachers. He went into that class with an 86% (this grade was transferred to his second biology class). On his report card, at the end of nine weeks, his average is now 70%. This means he has been failing for the past five weeks. We did not receive the progress report until the 11th week. We immediately requested a meeting with the teachers. They waited until the 14th week to see us, even though I told them that was way too late. At the meeting with the biology teacher, we were informed that our son has refused to do three assignments. A few months later our 16 year old was diagnosed with ADHD. What we can’t understand is why we were not contacted sooner with the problem in class, especially when he transferred in with an 86% for a similar class. We talked to the teacher some more and worked out what I thought was a plan to help him succeed but on his final report card for this class is an F grade. In my mind why can’t we give the second teacher an F for not communicating with us in a timely manner. Why, when a parent asks for a teacher meeting, do they have to wait three plus weeks to get that meeting? What good are teacher meetings if they still fail our son without the courtesy of contacting us after the meeting. What makes the above story worse is that several months later our son was diagnosed with ADHD. The teacher had no clue about this medical problem but all of the signs were there. In 5th grade our son could read at the 8th grade level but could not, without great difficulty, write or answer an open-ended question. We had conferences and meetings and nothing resulted. For years I heard that my son was lazy, immature, did not care, had a writing problem, etc. Some thought they were teaching my son lessons by giving him zeros when he turned in assignments late. In 8th grade it would take him 20 plus hours to write a few short handwritten pages. Finally, I told the 8th grade principal that I was not leaving the office until my son got tested. Nothing was found, so they claimed.

They even denied him 504 status. We continued to have all sorts of problems at home because VISD told us that there was nothing wrong with our son. Then in 10th grade he failed a biology class because the teacher said that he refused to do a number of assigned projects (i.e. an oral summary delivered to the class). Later in the second semester of 10th grade a fellow faculty member where I teach suggested that we test my son for attention deficit disorder (ADHD). We had a psychologist test him, and with respect to the inattention portion of ADHD our son had all nine signs. We went to the school with this and he was placed on 504. So apparently he was 504 all along. At the time of the correct diagnosis, I started to appeal the Fail grade (to Incomplete) because, according to the literature, our son was not refusing to cooperate in biology, he was asking for help and/or additional time with the assignment. I feel that I should not have to go through a lengthy appeals process since it was the school district that denied him 504 status. As it stands now on the F grade in biology, his parents failed our son, the teachers failed our son, the school district failed our son, whoever did the testing failed our son, yet it is only my son who has a failed grade on his report card. I would have thought that VISD would want to make this right.

- Enough is never done for the exceptional over-achiever – not enough resources, not enough course offerings. My daughter has experienced deep prejudice while trying to excel – she has had to fight and claw for teachers to “teach” her. She reports to me that her AP Chemistry class has completed chapter 6 (this is mid-April) and mostly does worksheets day after day. She feels very unprepared for college but is ranked in the top 1 percent of her class – so sad.
- Our high school is deficient in education service delivery because of its size, design, and projected purpose (accelerated block system) – I suggest getting out as quickly as possible. Early graduations are common. There is a real need for vocational skill training that collaborates with the business world. All advanced programs need to be enhanced so as to produce results that work toward college acceptance.
- Extracurricular – with twice the kids and half the spots, lots of kids are left out. Participation has become very limited. Kids are disenfranchised. Extracurricular budgets have been slashed.
- The block system encourages students to graduate early, so more credits need to be required. High school is the best place to try

new subjects. Students need to take exams to prepare for college. Some college courses (co-enrollment) need to be taught after the high school course is finished, example government. Schedules can be completed by the first day. Computers can do this job, right?

- Curriculum – Does everyone have a book? No. TAAS performance has been good. TAKS will be okay, also. There’s no GT at the high school level. I’m sure the district gets money for it but no one knows where it is. AP progress is due to teacher effort alone. Our curriculum director, though, is the best of the best. We have been working on aligning courses (vertical and horizontal) for several years and have made exceptional progress. Other jobs in the Administration at VISD are suspect. Don’t know what they do, but the salary our curriculum director makes is well-deserved.
- My son is in the gifted program. He has great teachers. He has students in class that are disrespectful and disobedient. Why is that? Why are “poorly behaving” children allowed in a gifted class? I worry about his safety – in PE and on campus. What, as a parent, can I do to deal with this?
- Some 10th graders are coming to the senior campus during the day to take the same courses that are taught on their own campus. Many 10th graders are on the senior campus all day. Also, many 10th graders are being bussed to the senior campus for football and other extra-curricular activities. I suggest that all 10th graders, along with 11th and 12th, attend the senior campus full time. The Stroman campus could be a 9th grade and at-risk students campus.
- I have concerns about special program funding – the administration missed a submission deadline for the STAR program grant. How can a professional that knows how essential this program is miss the grant submission date?
- I feel that the high school needs more than 2 academic levels – we currently offer regular classes and AP. This makes the ability level in each category too wide for effective teaching.
- Gifted and Talented program at the middle school is a joke. It is used poorly. I question the process of admission – we’re identifying high achievers, not true GT kids.
- With 49% of our students classified as economically disadvantaged, we need to access grants for extra programs.
- Computer classes should be offered to all grades in the high school. Students taking computer classes at Stroman need to be 10th graders but

we found out this year there are some 9th graders taking it at this time. The class is an AP class and it upsets GPA's.

- Practices in classrooms need to be monitored. The practice of showing movies that are not appropriate for the subject, or *Saturday Night Live* reruns in AP History class, is questionable.
- You can spend a fortune sending teachers to "staff development" seminars but who knows how much they're retaining. Nothing beats immediate attention paid to a teacher who is not performing professionally.
- Elementary principals need to use their faculty in a manner that emphasizes talents and subjects which the staff are prepared for and want to teach. The opposite has been done, in a punitive manner and without good reason. The middle schools have some problems. Principal-teacher relations need improvement. Teaching assignments could be done better. Coaching jobs are hired first then academic jobs are filled last. This is true for 6th through 8th in middle school and 9th through 12th grades in high school.

COMMUNITY INVOLVEMENT

- VISD keeps parents involved and informed.
- The community does not support or show any real interest in the school except to complain. Site-based management is a joke. School management does not involve teachers in decisions. Public relations seems to be the motivating force. If community and the district management and personnel worked together we could have a good district.
- Community involvement is nonexistent at the high school level. Parents cannot be found. Parent/guardians should be required to register the students with proof of residence and phone numbers. They should be required to attend conferences to get the student's grades. The community and school should work together to plan activities that utilize the school buildings. Teachers are chastised for telling parents the negative truth.
- No problem with elementary level. Problems begin with middle school. Parent communication ends when your child walks into Howell Middle School! We have repeatedly asked for more feedback and are very slowing getting info. They assume that word of mouth will suffice! Report cards have been habitually late coming out due to one excuse or another. We were 3+ weeks into the 3rd 9 weeks before we received our 2nd 9 weeks report card.

- I have been on several committees in the district. GT Parent Advisory, Building Committee, District Strategic Planning, IRT's from the strategic plan. My husband is on the Drug Task Force. We have had similar experiences in all of these instances. The committees were run by administrators who directed the final results. Maybe orchestrated is a better word. They would alter the results so the true feelings of the committee were not reflected. Often times "results" are given only after two or three meetings. They do not always represent the committee as a whole. Parents are just tokens. Opinions are not valued. The biggest waste of time was the strategic plan. After a very lengthy process, the results were disregarded by the board because certain "powers that be" in the community did not agree with what the cross-section of the community recommended. People are tired of trying to help because they feel their opinions don't count. The community leaders are more concerned with real estate value than sound educational practices.
- Clearly, there is not much of a relationship between school and community or the schools would not be in such disrepair! I don't think the public understands the shortage of textbooks, the drugs in the bathrooms, the lack of discipline, the lack of instruction. On a positive note – a local hospital group picked up the management of the Regional Science Fair. It was well done and quite successful. Perhaps there is a lesson here.
- I represent the Victoria Chamber of Commerce. We work hard to establish community relations through a business/community relationship. I have children in VISD and want to see it as a selling point for this community not a detriment. Schools are the very basic focal point for eco development – without an educated workforce, we cannot advance this community. For the past three years I have tried through our education committee to get programs in the school. But it seems we never really get in – our message is not delivered to the teacher level. About the only way we can move forward is to go to each individual school and try to communicate with the teachers. I think the teachers want our support and input. But it is difficult to break through the bureaucracy.
- I am very involved in my children's education. I feel the schools do not want parents involved and in the schools because we find out all the problems or bad things going on at the schools.

- Parental involvement is highly discouraged by senior administration. People are highly misinformed about day to day school activities. Communication is basically nonexistent.
- The present school board has made many positive steps toward opening communications within the district. Many more steps will need to be taken to achieve maximum results. This cohesive atmosphere will develop the closeness that will promote excellence in grade performance all through school (1-12) and in the elementary levels (1-5). VISD administration is the key factor in opening this door.
- My experience with communication between parents and teachers at the middle school level is frustrating. It is difficult to know what is happening when there is such a weak communication system. What I have asked for repeatedly is for our administration to look at “best practices,” to listen honestly to parent and community concerns and be willing to let the people go that must be let go, in order for us to make progress. It appears we cannot fire people in this district at the administrative level.
- Public schools have been a great invention to civilize us to be Americans. We need to work hard to promote a broad way to pay for them and be dedicated to fixing what is wrong with them and broadcast what is great about them. Many problems with public schools come from court decisions which affect only them. This is not relayed enough to the public. The public schools are responsible for paying for services that other schools do not have to allocate. We care about what we invest in so everyone needs to be part of funding the public schools. No educator can justify sin taxes to fund schools.
- Communication with instructors and school staff is haphazard at best. Teachers tell me many times they cannot access their VISD email. Often times, emails go unanswered in this electronic age. For many parents, email is the best way to keep in touch. Some clusters use an ezboard yet that is a one-way communication with no way to respond to the information posted. Do you really want to communicate with parents or is this just lip service? And school web pages are rarely updated.
- A work number is listed for both parents yet routinely the first call is made to our home. No parent is normally home during the day. So in addition to inadequate use of electronic resources, many times someone is just not thinking when they try to make contact. My child is important and I expect a call at work if a teacher or administrator needs to talk to me.

When I get home from work , after school hours, is no time to get a message from an answering machine.

- Parental involvement is fairly good at the elementary level. Something needs to be done to improve involvement at the junior high and high school level. I would like to see Victoria as a unified community, working together to make the system work for all students.
- The Drug Task Force hasn't met for 2 months and yet the board will hear “final plans” next month. Task forces, committees etc. are always overloaded with administrators that force the committees into decisions or misrepresent what truly occurred at them.

HUMAN RESOURCE MANAGEMENT

- Health insurance is awful when compared to local plants and the state insurance offered to DPS. I have never seen a worse policy. We are in flux presently because local physicians have protested, as well, the poor coverage and how difficult it is for them to get their money.
- I am concerned with health insurance issues for our district, limiting our use of our medical insurance to certain practitioners. This concerns me and I would hope the district could fix this so we could seek medical assistance from whomever we felt qualified to handle our health matters.
- I have been for some time now concerned with the recruitment of teachers. The personnel director spends a great deal of time out of town and I would like to see the figures on the number of qualified teachers he recruits from universities other than University of Houston – Victoria. Are his expenditures justified? It appears that we have more and more teachers that are alternatively certified – through Region III, exit exams, etc. More teachers that are not qualified to teach the subject matter. Some teachers are not passing the exit exams and are moved around to another subject and given an additional two years to try to pass exit exams in other areas. The district appears to entertain the practice of employing permanent substitutes instead of filling positions with certified teachers. In this way, they save the district money. Unfortunately, students are being severely handicapped and not prepared for college because of this increasing practice. Also, I do not believe parents are being informed that their students have unqualified personnel teaching a class. This is especially critical for math classes – a scenario of which I am personally aware in which a qualified Math

teacher was not moved into a vacant spot. The position was filled by a permanent sub. Really disturbing.

- Salaries are very low – much lower than other districts of the same size. I think we have illegal teachers working – those who retired and were rehired, but not in at-risk areas. No rehires should work more than ½ a day. That way the district benefits. When they are hired full-time they get conferences, etc. We have teachers who are not certified or who are teaching outside their field. Everyone – AP's and counselors – do their own thing. There is no structure and no one has an answer to any question because everyone does it a different way. We had a good structure that has fallen apart in the last two years. Great Unrest! Fear! Waste!
- I am concerned that the mid-range experienced teachers are not adequately compensated. For example, during the 2000-2001 school year, a teacher with 7 years' experience with a Bachelor's degree was paid \$33,000 yet in 2002-03, was paid \$32,840 and now in 2003-04 is paid \$32,225 even though it is reported every year (in the *Victoria Advocate*) that teachers received raises.
- Hiring coaches first and academics last means the subjects are less important and filled with what's left.
- Principals assign grade levels in a punitive manner when a teacher is not comfortable there.
- Staff development needs to relate directly to the teacher's teaching assignment.
- I question how complete the background checks are for substitute teachers. I know of two who have criminal records. This has been brought to the attention of the district but they are still working.
- The state and the district should be removing barriers that are forcing teachers out of the district while allowing those that should be leaving to stay.
- Salary needs to be improved to help the district get and keep qualified teachers. Raises do not need to be given uniformly. For example, a first year teacher should not receive the same raise as a teacher with 20 or plus years experience. The district needs to work on keeping highly qualified teachers.
- I believe that we are overstaffed administratively and need to try to cut some of that staffing instead of cutting teachers and placing too many students in the classroom. Smaller class size not

only improves the teaching environment but it also improves safety.

- Staff development is needed that will address the gang problems and violence in our schools. Teachers and administrators need to know what to look for in relation to gang activity. Salaries for VISD are well below the state average for a district of its size. Top positions are overpaid!
- As a teacher and parent of the district I am concerned we are losing qualified personnel due to poor salary and dissatisfaction with management on campuses. The alternative certification program is not screening personnel as it should. Instead of working to keep our teachers there seems to be more of a push to fill a space with just anyone. Faculty feels undervalued and unappreciated – this does affect job performance.
- There are many good teachers in VISD but there are a few bad apples. We complain about those bad apples and nothing is done. Why can't they get rid of bad teachers?
- Teacher morale can be much better. Administration needs to work toward common goals with its teaching staff. Some teachers fear retaliation if they speak to concerns that conflict with administration concerns.
- Health insurance needs to truly be a benefit. The school board needs to carefully choose what will be a real balance of economics and asset for district employers.

FACILITIES CONSTRUCTION, USE, AND MANAGEMENT

- Our experience at Chandler is excellent, however, our middle schools and high schools are in a state of needing repair. In particular Howell Middle School has such a small cafeteria that managing lunch time is difficult.
- Maintenance needs to focus on air conditioning any time the school needs it.
- Victoria needs two schools (4A) so that students can have UIL sports and academic activities. The southern high school can be sold since it has problems. A school can be built west of town near Regional.
- Don't let schools become too big, whether middle or elementary.
- Maintenance and custodial service are a joke. A work order request will be made on your campus, and sometimes we will wait for years to get them fixed. Only emergency items like broken windows get fixed.

- We see the custodians but they are just standing around. The school appearance looks filthy. If spills and minor repairs were taken care of right away, then the district would not have to pay “big bucks” to do major repairs and facilities would last longer. For example, new carpeting was put in a building – spills got on it, but they weren’t taken care of – now they are stained forever.
 - I’ve been a citizen of Victoria now for 14 years. In those 14 years I’ve seen this town grow by leaps and bounds. New businesses have come and new subdivisions have been built. It only stands to reason that the school population grew with the town. However, no new facilities have been built to accommodate a larger school population. In fact, I’d like to see a third high school campus built and the current high schools de-consolidated. This is the only way to solve the overcrowding problem.
 - Many of our schools are in terrible condition. Facilities are run down to the point of being dangerous. Stroman averages 2200-2300 students but was designed for 1800 students.
 - Computer labs are poorly designed and inadequate in number. Libraries need more books and computers. Science labs need updating.
 - Campuses are not clean – roaches, rats and mice can be seen and/or smelled. Money is spent on conference rooms when it should be spent on classrooms.
 - We need to look at redistricting elementary schools so we can utilize all the schools to full capacity. I would like to see a 9th grade school to transition students into high school. We need to fix problems with what we have. All schools need to be looked at, not just the high school. The elementary, junior and high school need to be looked at for facilities.
 - I have heard too many complaints from my high school children about how cold the classrooms are kept with air conditioning – so cold they need to bring jackets to school to keep warm. They say some teachers are worse than others. I think it is fiscally irresponsible to allow the classrooms to be cold that it is an uncomfortable learning situation for the students.
 - One campus is overcrowded and both are in dire need of repair. We have security cameras that are not hooked up to anything. Custodians’ pay is so low that they could apply for food stamps. There are lovely conference rooms on the Stroman campus but not enough books or space for teachers to do the mandated research papers. Roaches are rampant. Work orders are ignored or take forever.
 - Athletic facilities should be easier for the community to use and shouldn’t be intended to be rented for profit – e.g., the city youth football league should not have to pay \$900 to use Memorial Stadium for one day.
 - The process for community groups to use VISD facilities for meetings should be streamlined. It shouldn’t take 3-4 weeks to process a request.
 - Girls’ softball facilities are substandard for a district this size. It’s an embarrassment to the city.
 - A plan needs to be put in place now for dealing with the overcrowding at the middle schools and high schools.
 - The largest high school population (9-10) is in the smallest facility. Stroman is overcrowded. A lot of facilities in the district do not get the repairs they need. A lot of money was spent on Chandler, but no other schools received that kind of money for repairs. There are not enough chairs and desks in all classrooms. Stroman has mold problems.
 - There are too many students in the 9th and 10th campus. The boys’ bathrooms are dirty, according to my son. Some classes have too many students and not enough desks.
 - VISD needs more facilities for sports. We do not have any home fields for the school without having to use the city’s.
 - We need to look at the elementary campuses and address the population shift to the north. New subdivisions are being built near elementary schools that are full.
 - I would like to see us move toward a 9th grade center to enable us to focus on the needs of those kids. We could really work on remediation and take steps to get them ready for upper-level classes.
 - There is a safety issue pertaining to the mounting of televisions in the classrooms. One fell on a teacher at Rowland this year but fortunately missed any students. The television mount was installed with only masonry screws with no anchors or toggle bolts.
- ASSET AND RISK MANAGEMENT**
- A better asset management system needs to be put in place to prevent the district wasting money when they liquidate property at VISD surplus auctions. At each of the last 4 auctions there have been fully functional/new items sold

for pennies on the dollar, e.g. an almost new (few marks) computer desk was sold for \$15; retail list price is \$487.48. I am sure that desk could have been used by a teacher in one of our schools.

- Need a bond issue for new high school. Sell Memorial South.
- Improvement of the middle schools and high school will likely require a bond issue but I have concerns with this school board and administration managing the additional funds. To get community support they will need to put forth detailed plans and some way to show accountability for the funds.
- This school district is populated by “little kingdom” attitudes, and “I am invincible because of my position.” The district needs a complete management overhaul if it is ever going to recover. Look at the number of students escaping to other districts/private schooling/home schooling in order to get out of VISD. This should be better publicized. There are such multitudes of disgusted parents that do not know what the open house can accomplish and did not know they had an opportunity to give input. Most of administration has been around since the beginning of the problem, and perpetuate the problem.
- The legislature does not fund the school year before August (beginning of school).

FINANCIAL MANAGEMENT

- The block system is costing us several million dollars per year. Why do we insist on using this system? A lot of the teachers leave campus during this time but are being paid for about 23 days per year when you add up the time. (Other teachers only get 45 minutes per day.) Add to this the early graduates generated by the block and it adds up to about \$5 million.
- I would like to know where all the money for the ENLACE program has gone, besides the billboard near HEB!
- The budget for next year slants toward extracurricular and co-curricular areas. We don't have money for every teacher to have one computer in their room, but we can spend \$26,000 on chartered buses for non-district games? We are shamed in faculty meetings for paper use but raises in stipends for coaches are made without question? The problem is focus, and the focus is definitely not on academics.
- Budgets are not proportionately designed. Far too much focus is on athletics, too little on technology.

- Experienced teachers have not received step raises, in lieu of a \$600 across-the-board increase. This attracts less experienced and uncertified teachers. There is little difference between the beginning salary and a teacher of ten years.
- The budget does not allow funds to be spread throughout evenly. Extracurricular activities are not all shared equally. It seems as though the boys' activities or UIL sanctioned activities receive the majority of the funds and those that are not UIL receive less, yet provide great support to the football teams, etc.
- Money seems to shift on the books to give a certain flavor at preferred times. The fund balance at present is showing growth – I hope the numbers are real and don't vanish as quickly as they have appeared. Budget concerns need to be aired publicly long before the final considerations in August. The administration needs to be more upfront in their intentions, publicly.
- The district needs detailed accounting procedures. The state needs to fund with a broad tax. The public cares about what they invest in. No educator should support sin tax support.
- Improvement of our high school will most likely need bond money to address its concerns properly. (Bond issue now!)
- The superintendent needs to show plans for several years out. His influence can and should guide this district.
- Legislative funding is not done in a timely manner before August.
- There needs to be a precise bookkeeping system to keep track of where funds are coming from and going to. The more detailed the information the better the money can be used. Misused funds have shocked the public. When major equipment breaks the district needs to be informed so the students are not denied. When dangerous behavior threatens students in locker rooms, restrooms and hallways, then positive steps need to be taken. The state needs to make sure that money awarded for academic performance is spent on student needs, since students earned it.
- Responsibility demands financial support. Public schools have the responsibility! Our Texas governor and legislators need to use a broad-based financial way to fund public schools. We need you and everyone else to promote it.

- Please add up what it costs a family in one year for all the additional items a student is asked to pay for, or to sell junk for. School pictures, yearbooks, field trips, organization photos, extracurricular trips, the list is endless. I have been given a list of costs for high school band next year and it is outrageous, just under \$300. Do athletes pay these same kinds of fees? For coaching? For transport? I understand the need to raise funds when it is your hobby, but these are programs that are school-sponsored. Why are they not school-funded? And from talking to other parents, I find that if it is not football, the family pays for a great deal of the cost.
- School supplies need to be standardized and more down-to-earth. Do you realize how many teachers expect a separate binder and supplies for their class? Have you priced school supplies lately? I believe a standardized, reasonable school supplies list can be created for each grade across the system.
- The most consistent part of academic life has become the fundraiser. I am not sending my child to school to learn solely to be a salesman. Yet after 12 years of this, it becomes their most practiced skill. I am so tired of the cheap incentives that get thrown into the mix. I expect my tax dollars to fund the schools, not my child's ability to sell candy. She does not attend school to learn to be a shill. If the PTO needs to raise funds, then the parents should be selling, not the students. This endless fundraising absolutely must be abolished.
- The board needs to see that both Stroman and Memorial are funded equally. Many times, it appears that Stroman still takes a back seat in funding. Best example of this is the absolute inadequacy of Stroman for the size of the student population. But sooner or later the need will arise for an additional school. Hopefully my child will be finished and that contentious decision will not have a personal effect.
- Almost all funding is directed towards low-achieving students.

PURCHASING AND WAREHOUSING

- I feel the district does well with the limited budget they have. I know they also use the items from the warehouses.
- I still do not understand why I [a teacher] have to buy from one entity when I can get the same item from Wal-Mart or other location for much less. The district wastes thousands of dollars every year. When the yearly auction occurs, teachers from the campuses used to be allowed

to go see if there were any items they could use on their campus. The last few years we have not been allowed access because "it causes too much paperwork" and chaos "for the warehouse and personnel." So we continue to have desks that are 35 years old in some classrooms while new ones are sold for pennies.

- Make students responsible for books. Build storage (locked) cabinets to protect books and other supplies.

COMPUTERS AND TECHNOLOGY

- Computers and technology are something that VISD can be proud of. They do a great job of keeping up with technology. Sometimes the computers tied up the phone lines, but with broadband that has changed.
- There surely must be problems in this area, as schedules were not prepared by start of school year. Questions can never be answered regarding rank, graduation requirements, etc. because "the computers are down."
- Our elementary schools have decent technology, but access to technology rapidly drops off at the middle school level. Surely there are grants and other funding resources that could be tapped into to make a difference.
- Not enough computers for every teacher to have one in their classes. One lab with horribly outdated equipment. It's so behind times everywhere that students laugh at the equipment we have. This is a cheap district. I don't expect any change.
- Chandler Elementary is state of the art! However, Howell Middle School is lacking seriously! My son has done two PowerPoint presentations that the teachers could not even access! Luckily he has the ability at home and the development from his previous schools in Houston. I have learned now that he has to take a class in 8th grade on basic computer skills. They are doing this in an effort to satisfy complaints about no computers. So instead of taking a class that can benefit him he will be making time here. What a waste! My son is currently assisting some of his teachers with computer applications! What is going on?
- Our technology at the high school level is woefully inadequate. At the senior campus library, we have only 12 computers (when all are working) – we are still running Windows 95 on them. Most are over 5 years old. Our students are so frustrated using these computers – they will crash on them after they have typed their papers, losing everything. The library is the only

place in the school where all students can have access to computers. Yes, there are some computers in classrooms, but only those students can use them in the classroom. Our computer science teachers have labs that are in poor shape as well – they try to do minor repairs to keep them running, but often the software they need to teach their classrooms won't even work on their computers.

- MIS is understaffed. We wait for months, sometimes over a year, for repairs to be done. Also some of their techs are not so knowledgeable. They don't know how to do the repairs.
- The use of technology needs to be more of a priority overall. Comfort with and basic proficiency with computers and keyboarding requires more than 1 semester during your freshman year. These are skills that are demanded by today's employers, and the majority of students graduate computer illiterate.
- Our technology resources are very inadequate, especially at the high school level. Many of the computer labs are equipped with outdated software and ten-year-old computers. Many teachers do not have a decent computer in their classroom. Color – or just decent – printers, data projectors, and scanners are badly needed.
- Teachers are still not receiving enough IT instruction to successfully use technology in the classroom and teach students. Computer technology is outdated in some schools.
- Middle schools should have computer teachers receiving input for subject teachers, because they are the expert with a room of machines and familiar with their use. Stop the "lab" method with assigned subject times.
- New technology is required and needed, and unfounded state and federal mandates cost more money than in decades past. The decreasing state percentage of funding has put schools in a bind. This deprives students.

FOOD SERVICES

- VISD has a good choice daily of items for children to choose from. Most of the meals are balanced.
- Good job at Howell – they never have the highest caffeine drinks.
- Food is served to my 11th grade child at about 2:00. This is much too late to be serving a high school lunch. I think addressing this will improve the attention of restless students.

- The amount of time allotted for the children to eat at the Stroman campus is not sufficient enough time for them to eat due to the number of students. Students will not eat a balanced meal due to the fact that the lines are too long and there would not be enough time if they waited, therefore they eat a bag of chips, etc. The cafeteria is also too small.
- The cafeteria at the MHS Stroman campus is not large enough for the number of students who attend school there. There are presently 3 lunch periods – one of the periods is scheduled from 1:40 – 2:10. This is really late for lunch. The second lunch calls for a split: 3rd block – 45 minutes, lunch – 45 minutes. This is far from an ideal situation.
- Lunches at the school are much too late for the students, even at a 8:00 – 5:00 job we as employees do not have a lunch hour no later than 1:00. Most of the students get by on chips and Coke because it's fast, but it is most expensive.
- I think the cafeteria and staff do a lot with a little. Some students must wait till late in the afternoon to eat, which is not good for the children.
- The food is fairly tasty and nutritious, but many alternative junk foods are offered and students choose that. The time allotted for lunch is too short.
- The quality of food is poor! Need more nutritious food. The last lunch at the high schools is too late! 1:40 to 2:10.

TRANSPORTATION

- VISD has an excellent transportation service. I can't commend them enough for their efforts and accomplishments.
- Transportation is available, but not realistic; the elementary bus comes at 6:35 AM while school does not start until 8:00 AM. Junior high releases at 3:25 PM and the school bus does not deliver them until after 4:30. In addition, it carries high school kids with middle school kids – not good!
- Have 2 high schools, less buses. Enforce bus rules (safety).
- Children are on buses way too long. Some elementary students don't get home until 5 PM because of their route. Outlying areas have the worst issues.
- How much money is spent shuttling kids between the HS campuses? How much money is

spent now that 780+ students have been added into the bus system because of the HS?

- Bus transportation can be better addressed. The poor design of our high school is proof of this fault. Transportation between the two structures, approx. 3 miles, shows many a bus less than ½ full. The vehicles appear to be safe and drivers are good. It would be nice to not see a bus about 6:00 PM going back to the bus barn everyday? Does this mean some children face 10-11 hour days?
- Some students are being transported back and forth (after 1st, back to Stroman, back to main campus), which poses problems – teachers angry when student arrives late, etc.
- Students spend too much time riding the bus back and forth from the two campuses! They are late to their classes almost every day!
- The transportation department is stretched as far as it can be. One problem is bussing students back and forth between campuses because of the two schools. Cost is a factor. Time is a factor. Students from CDS and Profit are on our campus roaming the halls 20-30 minutes before school is dismissed so the buses can get to the appropriate campus for after school delivery. I think they do an admirable job given the circumstances.
- It is absurd that it takes 1 hour 15 minutes to deliver 6-7 students for after-school services.
- Transportation is horrible for those students that require busing during the day due to having classes at another campus. My child has had to call me at least 6 times in the last couple of months, because the bus was late or forgot to pick them up from Drill Team. I have had to leave work, pick her up and take her back to the Stroman campus. She then has to deal with teachers' comments/remarks that she is late, or they are unwilling to help the students with what they missed (due to missing the bus). One teacher would tell her to come during lunch for help, because he did not want to disrupt class, which is understandable. However, lunch is already so screwed up, but he wasn't thinking of the student – he was thinking of himself. She continually asked to come in the morning, but he always said to come at lunch. When he did agree to come in the morning, he should have been there at 7:30 AM and did not arrive until 7:45 – 7:50.
- Transportation for the after-school programs is a problem – substitutes don't have scheduled routes, simply dropping the children off in the

order they were signed in. There are concerns over the children's free time.

SAFETY AND SECURITY

- I truly feel that VISD works well with the local law enforcement agencies. I feel the schools in general are pretty safe and secure.
- We need to address campus populations on the junior high and high school campuses. Overcrowding has affected discipline and created an atmosphere so chaotic in some areas that education is not taking place. Teachers are policing problem students rather than teaching. Even when they remove students, they come right back to the classroom and feel empowered because nothing happened.
- Several schools have had repeated break-ins, losing lots of money and equipment. It needs better security.
- Classrooms that are out of control perhaps need to be monitored electronically if principals have no time to walk halls and check on teachers.
- Nothing beats immediate attention to a student who is acting inappropriately (i.e. cussing, on drugs, etc.) Some teachers could teach if they were allowed to do so.
- The discipline policy and guidelines for this district need to be reviewed and compared to other districts. Teachers complain of not being able to deal with problem students. At Howell middle school, the principals and staff say they do not have the tools to deal with poor student behavior. Their solution has been to eliminate PE for all the 7th grade students and limit field trips. The staff is not adequately supporting the teachers when they discipline students.
- Discipline policies need to be enforced and explained clearly to students and parents.
- Dressing rooms and restrooms present violent dangers to students, and need supervision.
- Kids get in fights at the middle school levels all the time. My children are “rule followers.” They don't understand the environment. They don't like the fights, the bullying. I worry it will only get worse. My younger children ride the bus home (a short ride). They were bullied repeatedly last year. Some bus drivers keep the kids under control, others seem to sympathize with the misbehaviors and won't stand up for the “good kids.” It's a social issue – and I am not sure what to do about it.
- The practice of ticketing students does very little to alleviate problems. The family ends up bearing the burden financially. There is very

little opportunity for young people to find employment to pay the fines. Find a way to punish the offender and not the family.

- One “five star” female on senior campus would better be described as a bully.
- Our elementary schools have good security and produce good grades. This appears to be because of the smaller campus sizes. Our district shows a decline in both discipline and safety as our children enter middle schools (too large). The problems grow and spread as the children finally end up in this all-too-large high school. Teachers and students are in a very stressful atmosphere. I do not feel all acts of violence are currently being reported to the proper authorities. This represents a breakdown on the administration level.
- Schools are not safe. Drugs are rampant. Drug dogs need to be at least a monthly occurrence.
- I have found that the Security Guards who are here to do a job are very unprofessional. If you are to ask the students most of them are “cool” with the kids, which breeds many problems. Students are not to leave campus, but are allowed to do so if you are “cool” with the guards. If the guards want they can and will harass a child. My child was slapped by a security guard on Jan. 21st and this person has been allowed to continue to work, and has never apologized. The school and school board have yet to give any explanation of their investigation. This security guard has been allowed to mouth to her peers with great pleasure. My son has had to leave class to re-park his car. There are so many issues that no one wants or will take accountability.
- VISD needs more security people on all campuses. There is too much open room for kids to leave and no one know they’re gone; it also leaves room for a lot of people to wander in off the street. They need golf carts to move around in, to cover the whole campus. There are too many kids, not enough security people.
- There is no valid security or reporting to parents.
- Recently my son moved to the senior campus and has been so relieved to be in another atmosphere. He wants to go to school. His freshman and sophomore year are not an experience he wants to repeat. He is an Honors student active in many extracurricular activities, but felt the campus was out of control. Smaller 9th and 10th grade campus populations are a great need for our district.

- Safety is of great concern. Violence and drugs are rampant, and discipline extremely lax. 75 to 80% of the students are using drugs. Many teachers have given up trying to control and teach their classes. The building on the Stroman campus is overcrowded and understaffed with unqualified people.
- I have a problem with the security guards at the high school. They appear to be unqualified to do their job. They pick and choose the students they want to discipline. They are not consistent.
- Teachers need to be backed by the administration to discipline their class so that they can teach their students. Disruptive students need to be removed from class so other students can learn.
- Safety is a serious concern for VISD. Our high school campuses are easily a true danger zone. Overcrowding at the MHS Stroman campus leads to many problems – safety (evacuation in case of an emergency would be a disaster) – fights (too many students, too little security) – drugs (students can almost disappear to deal and do drugs – again, too many students and too little security). Discipline policies are not consistently enforced. Our alternative education program is a joke – the kids sent there like it.
- My child has come home on several occasions and informed me of the drugs that are on campus. She also states that when the drug dogs are on campus all students are made aware through text messaging one another. If the drug dogs are brought to the school, there should be a complete lockdown immediately. Teachers should make sure that students are not text messaged, phoned, etc. My child also reports that drugs are being sold or given out at school. She has witnessed this with her own eyes and was even handed some. She did not know what to do with it and due to peer pressure walked over to a trash can and disposed of it. Shame on her for holding out her hand and accepting it, but I am glad that she was smart enough to throw it away.
- I have also heard several complaints against several security guards, male and female, who harass the Victoriadores for using the word or wearing the word on clothing. These security guards have much greater issues to deal with. Teachers also display the same attitude towards students. If the district would hire real police officers instead of Rent-a-Cops, there would be less of this going on. The women security guards especially harass the girls. There is an uncomfortable feeling with them. Leave the

girls/students alone and concentrate on the real issues.

- What security? What safety? My biggest fear working at the high school is that we will have an incident and students will die. We're very lucky it hasn't happened yet. The security guards say nothing to students in the hall. I have yet to see one reprimand a student for dress codes or any other violation this school year. There are never AP's in the hallway. There was an occasion this year when during finals the principal addressed a student in the hallway, asking why he was still on campus if he had finished his test. The principal did not know that the rule was that all students stay in class to the end of the period.
- When teachers call for help it takes a long time for anyone to show up. Buttons don't work. Some wings have no men on them if anything happens.
- Student discipline is inconsistent and racially imbalanced – that is to say, there is partiality among racial groups. The administration doesn't follow through for all students – same rules for all, etc. There is not enough drug enforcement, i.e. random checks, drug dogs, evident security on campus. Zero Tolerance is not enforced.
- Although I do not have a child in high school yet, I will have one going to the Stroman campus in two years. Frankly, as a parent, I am horrified by the stories I hear from other parents, teachers, and students about that campus. I am writing not about a specific security issue. Rather, it's the overall perception that's attached to the Stroman campus. The community perceives the campus as unsafe, over-crowded, drug infested, and falling apart. This is the picture that's painted for us, future parents of Stroman students. Not a very bright picture, is it?
- Why does one student get 45 days at the Alternative school for a minor offense and another get 7 days suspension for selling cocaine? Why can a student be a known drug offender yet hold student office positions and receive awards that supposedly take conduct into consideration? Why is the discipline not consistent?
- The open campus allows not only for students who don't belong there to leave and enter (and cause problems) but also for students to stop in between campuses to pick up drugs. There is a very bad drug neighborhood between the campuses. This open campus contributes to the drug problems.

- The high schools do not make it public knowledge of what really goes on during school. We find out from our kids or friends' kids. If administrators and teachers are not sending their own kids to VISD schools they must know something that we don't!
- As a parent of a high school student and also a teacher in the district, the district does not address discipline effectively in the upper levels. My experience at the Stroman campus the students feel threatened and intimidated by the crowds and the unruly students who never seem to be removed from classrooms. Teachers are frustrated handling discipline more than teaching. I see at the junior high campuses where I work there is no follow-through on students who do not abide by class rules. They are shuffled through a system that puts them back in the classroom too quickly with no accountability for their actions. Limited room at Mitchell is an excuse. These students who disrupt learning should be removed and parents pushed to take responsibility for their behavior, fined, placed in another setting so that education can continue. As a teacher I feel powerlessness to control these students who feel they are in control on the system. They know nothing will happen.
- I perceive that we hold both teachers and private guards responsible for campus safety and security. I am concerned that such a system will not work.
- About two weeks ago, I had a conference with the Assistant Superintendent of School Improvement. I had sent her a letter and she came to the Stroman campus to hear me out regarding this incident, and how discipline is handled generally. I assured her I was not alone in the frustration teachers feel regarding how students are dealt with. I have done my best to follow the "chain of command" when handling such issues, and so I pursued the actions I have taken from the AP, to the Associate Principal, to the Assistant Superintendent. As I concluded my meeting with her, I expressed the desire to hear back from her regarding her decision. To this date, I have not heard back from her, either.
- In short, about a dozen students left without permission after turning in the final exam. The Associate Principal told me to "write them up." After a month, I wrote a memo asking about them. After not hearing from any of the AP's for a month, I made a copy of that memo and forwarded it to the Associate Principal. I brought this matter up with the Assistant Superintendent of School Improvement. I have

not heard from her regarding her decision, except for a note thanking me for my input. This may seem like “water under the bridge,” but that’s only because these issues have not been handled in a timely manner. I am willing to enforce the students’ Code of Conduct, but I have to expect that someone will follow through on the enforcement for me to continue my part.

- Methods to cope with disruptive students need to be firm and fair. Attacks in the locker room and restrooms and hallways need to be lessened. The state report card encourages schools to find ways around reporting office visits. This keeps principals from handling them in the proper way. Discipline problems often come from home and schools are not the cause.
- High school principals do not back up teachers, and override rules when a student or parent goes in to talk one-on-one.
- Principals need to be firm with students and parents to correct disruptive behavior. Even young students do dangerous things to teachers and students.
- Though a junior high student, my child has already been treated for back problems related to the carrying of a heavy backpack. Lockers are not provided at all schools and the ones that have them, the lockers are inadequate to hold a backpack with wheels. I am told that backpacks and lockers are a security issue. In that case, use metal detectors and drug sniffing dogs, but provide adequate storage for student items.
- A sign on the front door indicating visitors need to stop at the office is inadequate. A school administration office staffed primarily by students is dangerous and stupid. How do these students know who is allowed to get a child from school? What message do we send our children about school when we allow them to spend a period working in a school administrative office instead of being in class? This ranks right up there with study hall. Students should not be used for this function, they are in school to learn academics not how to sign a student in and out or run messages. Get real about school security – have someone at the front door to direct visitors. Really look at the efforts to keep our schools safe.
- A Stroman campus parent withdrew a child due to safety issues.

COMMENTS ON TEXAS SCHOOL PERFORMANCE REVIEW PROCESS

- I would also like to express my disappointment at this process. Filling out cards! For this you earn your salary? And no, we were not informed that this would be process. Many left – thinking there was going to be a dialogue – a discussion.
- The creator of the Texas Schools Performance Review program had a good idea to evaluate the schools. With constructive suggestions each district can be the best possible with their resources. We need more creative legislators and government officials like him. We miss him. Thank you for coming to Victoria and I hope good suggestions develop.

FOCUS GROUP COMMENTS

As part of Victoria Independent School District (VISD) performance review, focus groups were held community and business members, teachers, campus administrators, and support staff. Participants were asked to comment on the 12 areas under review. These comments do not necessarily reflect the findings or opinion of the Legislative Budget Board or review team. The following is a summary of comments received by focus area.

DISTRICT LEADERSHIP ORGANIZATION & MANAGEMENT

- Time to move on.
- Board micromanagement. An example is in computer technology purchases.
- Questionable board confidentiality.
- Need to be interactive and have a presence in the schools (board and district management). Some try, but there are conflicting demands. Few board members are visible on campuses.
- Too many meetings, especially for principals, who must all attend – leaving campuses unattended. Council meetings sometimes last all morning. Must have good support in office.
- Board is telling administration what to look at including alternatives to district organization (consolidation/de-consolidation).
- Not getting things done (test scores, drop-outs, economics, demographic shifts, drug problems).
- Over crowding in some schools.
- Administration whitewashes issues.
- Site based management is ineffective.
- District administration is supportive.
- Board members don't attend school functions.
- Overly focused on consolidation issue. Allocation of resources (including technology) is set aside for "grand plan" in some board members' minds.
- Kids like the way high schools are configured – move on.
- No recognition from board for student success.
- Spent four months studying schedule (based on what they want rather than what they need).
- All focus is on high school plan and goals.
- Teachers and principals don't have board support – only care about MHS.
- Adequate support from superintendent. Can call him readily – here for the right reasons. Supportive of innovation.

EDUCATION SERVICES DELIVERY

- Campus administrators are doing more walk-throughs.
- There is less trust.
- Curriculum Department involves teachers in the curriculum development process (English, Science & Math).

- Make an effort to accommodate students with special needs.
- Teachers having trouble because of expectations/emphasis on the "TEST" (some kids just don't test well).
- Counselors have so much data-entry and paper work that they can't counsel.
- Alignment from district to district is a problem.
- Bilingual reinforcement at home is a problem.
- Low level of preparedness for college.
- Curriculum alignment – middle group is slowed down.
- Teachers lack confidence that they have upper level support.
- TAKS runs things – too much attention.
- Elementary schools are doing well.
- Dedicated teachers and staff need rewards/recognition.
- Too much program "du jour" – not enough follow through and focus on successful programs.
- Science Fair – Rotary Club are examples of commendable programs.
- Only two levels of classes (AP & accelerated) – there are no longer any honors classes.
- Faculty doesn't want to participate in service club organizations.
- Not aggressive in seeking grants.
- No summer reading program.
- Scope and sequence is adequate and consistent.
- Teachers helpful in creating assessment models.
- Counselors juggle expectations very well – many counsel groups of students. Need more upper level counselors. Parent liaisons provide assistance in this area.
- Early childhood education needs more attention.
- Special needs – good intervention programs appeal to smaller area districts.
- Bilingual – very successful – some bussed. Bilingual plan relied on parent involvement. Need to ensure bilingual programs adequately equipped (including translation) with resources.
- District is proactive – current – up to date – share information.
- Training of Trainers – provide own staff development – upfront investment – design plan to deliver training district-wide.
- Collaboration between schools – across city and socio-economic classes.
- Wonderful resources for each other.

COMMUNITY INVOLVEMENT

- Not enough volunteers.
- Partnerships are sought by campuses.
- University of Houston – Victoria – Victoria College "Education – Alliance."
- Business responsive.

- Rotary Club – Academic UIL winners banquet.
- McDonalds – Elementary library grant.
- Donations are used for incentives.
- Parent Liaisons are essential.
- Not any organized campus effort.
- Parent liaison funded by Title I – not available on all campuses.
- Ensure that law is followed (drop-outs, drugs) so that funds aren't pulled.
- Chamber wants to work with district in order to create more productive workforce/citizenry.
- District needs money and Chamber wants interaction at higher level. Trying to link business community with schools but not meeting with success (e.g. construction contracts).
- Not enough marketing of current information – lack of community trust. Need this to market to incoming businesses.
- Volunteers not welcomed above elementary level.
- No functioning PTO in high schools.

HUMAN RESOURCE MANAGEMENT

- Lack of district support.
- Re-hire policy is unfair.
- Requirements changed for teacher appraisal – can be every 5 years – district still wants to do it annually.
- Cut in salary – due to cost of insurance.
- Social Security and TRS not allowed in VISD (teachers are not allowed to vote on this).
- Retirements – field based training from University of Houston – Victoria. Heavy recruitment.
- Region III – alternative certification is good program.
- Victoria College – University of Houston – Victoria – paraprofessionals get education incentives.
- Starting salary pretty good – increases are harder to come by.
- High need areas. State needs to provide incentives to ensure availability.
- No administrative pay raises.
- Not competitive in administrative pay.
- Unfair treatment for employees who lose jobs because of program discontinuation.
- Inequality of salaries relative to position.
- Salary placement – inequity in pay scale (mid-point) for classified employees– responsibilities increased.
- Need more clerical help on campuses.
- Benefits – Insurance is very expensive (self-insured). Most can't afford the highest level package.
- Less than acceptable level of confidentiality in Human Resources.
- Not all office employees clock in and out.
- Leave form is cumbersome.

FACILITIES CONTRUCTION, USE , AND MANAGEMENT

- Painting was done during the school year. Fumes were very strong.
- Not enough materials in non-magnet schools.
- Inequity exists between haves and have-nots.
- Maintenance generally good – example cafeteria.
- Juan Linn elementary had an excellent renovation.
- Tremendous change from previous years.
- Contract work not as good.
- Custodial services – head custodians and maintenance/custodial department – sometimes cause campuses problems. Administrators don't have input into hiring or problems.
- Clean and set up for events.
- No auditorium in district.
- Renovated classrooms as classes in session without disruption – two week turnaround – beautiful workmanship – don't feel inconvenienced.
- Stroman not as well maintained as other campuses.
- Custodians have inadequate equipment.
- Hurricane damage needs to be revisited.
- Patti Welder needs better lighting in back on Laurent.
- Climate control – energy management – regulated by school dates – no air/heat for staff if students are not in session.
- Maintenance is responsive.
- Declining conditions at high school – RATS.

ASSET & RISK MANAGEMENT

- No safety training.
- Inventory – Break-in or theft – taken off inventory.
- Have computer inventory annually to put them back where they should be.
- Control supplies.
- Activity accounts should be audited – become part of evaluation system.
- Armored car picks up daily – two people count and sign for cash.

FINANCIAL MANAGEMENT

- Questionable allocation between MHS and Stroman (apparently not enrollment based).
- System requires that purchases be made early in the year to avoid “loss” of resources.
- Loss of Safe School (healthy students) funding program. Additional programs are also in jeopardy.
- District has to fund some programs at the expense of student safety (lots of extra costs – copying, etc).
- Very knowledgeable, communicate well; very approachable and helpful.
- Very proactive – not territorial.
- Very creative problem solving.

- Special needs – relatively autonomous spending allowed at campus level.
- Lots of overtime in Business Office.
- Provides materials to staff to facilitate budget.
- Budget conservatively.
- Projections on target.
- Spend conservatively.

PURCHASING AND WAREHOUSING

- Cost of computers too high – approved vendors charge too much.
- Purchase order police – budget manager SCE – the process in place is working.
- Warehouse – central receiving.
- Labeled when items are delivered.
- Communication is good with Purchasing Department.
- Very good.

COMPUTERS AND TECHNOLOGY

- Not enough support.
- Understaffed.
- Have a “plan” but it is not generally working.
- Five technicians in district (delays response time).
- Not all teachers have computers – K-2 don’t have current software or adequate equipment.
- Just finally have district-wide virus protection.
- 0.8 percent of operating budget goes to technology.
- No special technology budget – rely on PTA/PTO.
- Intel – Teach to the Future – TOT – included an equipment allocation.
- Dual platforms.
- Standards not always enforced – bid with Tangent – not always best price.
- Software – standards not in place.
- Network standards exist – not stand alone equipment.
- Inadequate, aging equipment – many computers over 5 years old.
- Manual payroll.
- Teachers don’t have enough equipment or training (particularly non-magnet schools).
- Not enough MIS technicians – low district budget for technology.
- Video streaming – partnership with University of Houston – Victoria – step in right direction.
- Increase in distance learning opportunities.
- Computers still using Windows 95.

FOOD SERVICES

- Snack machines affect student’s nutrition.
- Food service – nutrition is questionable – need salad bar.
- Phenomenal job with resources.
- Provide up-to-date information.

- Included in staff functions.
- Testing – provide free breakfast.
- Field trips.
- Feed kids when they need it.
- May run out of daily entrees – “manager’s surprise” not always appetizing.
- Staff Training – provide scholarships.
- Could do a better job notifying parents when their accounts need money.
- Great enchiladas.
- Clean kitchens.

TRANSPORTATION

- Athletic event pre-empted field trip that had been planned months in advance.
- No alternative transportation for events.
- Listen: Example: bussed student to crisis center – sent female bus driver to reduce trauma on student.
- Amount of time on bus is a problem – transfers to cluster schools – long routes – rural.
- No computerized routing system.
- Tagging every year – big time commitment.
- Bilingual – Spanish-speaking driver not assigned to cluster.
- Accommodating. Try very hard.
- Discipline referrals to campus.
- Security guard on Mitchell Guidance Center bus.
- Pretty good.

SAFETY & SECURITY

- Discipline has deteriorated – student’s behavior, hallways, etc.
- Campus administrators say their hands are tied.
- Inaccurate data previously.
- No longer have ISS position – need to stop at earlier age.
- Not a lot of community based programs. Not enough support from community.
- More pro-active in staff development.
- Media not supportive of academic success.
- Change in home life and demographics has made a difference in volunteers. Some administrators feel that volunteers may pose risk.
- Police department (chief) led mock disaster scenario (city grant).
- SRO’s in High School. Some contracted security guards.
- Increase in gang related problems.
- Two to three arrests per month (Stroman) – no metal detectors, some cameras (monitors in principal’s office but principals are not always in office)
- Some students supposed to go to Mitchell for 45 days – back in 15 days (majority of the issue is a space problem) – students don’t take punishment seriously – has no teeth.

- There is definitely problem with the alternative education program
- Inconsistent discipline based on wealth/lack of it.
- Students very “vocal” – lack of respect. Lack of district support for disciplinary action at campus level. Problems at all school levels.
- Teen pregnancy contributed to ongoing problem – STAR program lost to “support” this problem.
- Trained on crisis management.
- Board supported “Zero Tolerance.”
- Lack of discipline, mostly at junior campus.
- Question never followed up on – Does board get incident information as they requested?
- Dress code not enforced.

PARENT SURVEY RESULTS
(WRITTEN/SELF-ADMINISTERED)
(N=353)

Note: Totals may not add to 100 percent due to rounding.

PART A: DEMOGRAPHIC DATA

STATEMENT	FEMALE	MALE	NO RESPONSE
1. Gender (Optional)	69.0%	23.3%	7.8%

STATEMENT	AFRICAN-AMERICAN	ANGLO	ASIAN	HISPANIC	OTHER	NO RESPONSE
2. Ethnicity (Optional)	3.7%	50.6%	0.9%	36.5%	1.2%	7.2%

STATEMENT	0-5 YEARS	6-10 YEARS	11-YEARS OR MORE	NO RESPONSE
3. How long have you lived in Victoria ISD?	16.7%	15.8%	63.8%	3.7%

STATEMENT	GRADE LEVEL		GRADE LEVEL	
4. What grade level(s) does your child(ren) attend?	Pre-Kindergarten	8.3%	Sixth Grade	12.9%
	Kindergarten	14.9%	Seventh Grade	15.2%
	First Grade	14.1%	Eighth Grade	12.4%
	Second Grade	13.8%	Ninth Grade	17.5%
	Third Grade	15.2%	Tenth Grade	17.0%
	Fourth Grade	14.4%	Eleventh Grade	11.8%
	Fifth Grade	14.4%	Twelfth Grade	13.5%

PART B: SURVEY QUESTIONS

A. DISTRICT ORGANIZATION AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
1. The school board allows sufficient time for public input at meetings.	6.0%	36.5%	38.5%	14.7%	4.3%
2. School board members listen to the opinions and desires of others.	5.2%	29.6%	32.2%	23.6%	9.5%
3. The superintendent is a respected and effective instructional leader.	13.2%	37.6%	36.2%	10.6%	2.3%
4. The superintendent is a respected and effective business manager.	10.9%	38.5%	37.9%	10.3%	2.3%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
5. The district provides a high quality of services.	7.8%	51.7%	15.2%	21.3%	4.0%
6. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	8.6%	37.6%	33.1%	17.0%	3.7%
7. The needs of the college-bound student are being met.	5.2%	43.4%	24.7%	19.8%	6.9%
8. The needs of the work-bound student are being met.	6.3%	40.5%	31.3%	18.4%	3.5%
9. The district has effective educational programs for the following:					
a. Reading	13.8%	65.8%	5.8%	12.1%	2.6%
b. Writing	11.8%	64.1%	6.9%	14.7%	2.6%
c. Mathematics	11.8%	63.2%	6.6%	16.7%	1.7%
d. Science	12.4%	61.8%	8.9%	15.8%	1.2%
e. English or Language Arts	11.2%	67.0%	8.6%	12.1%	1.2%
f. Computer Instruction	11.2%	58.1%	10.3%	17.2%	3.2%
g. Social Studies (history or geography)	10.4%	71.4%	9.1%	7.8%	1.3%
h. Fine Arts	8.9%	56.9%	13.5%	17.2%	3.5%
i. Physical Education	14.9%	62.9%	7.5%	11.8%	2.9%
j. Business Education	6.6%	46.8%	30.8%	13.2%	2.6%

**B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT
(CONTINUED)**

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
k. Vocational (Career and Technology) Education	7.2%	49.4%	28.7%	11.5%	3.2%
l. Foreign Language	8.9%	51.7%	21.6%	14.4%	3.5%
10. The district has effective special programs for the following:					
a. Library Service	10.3%	56.0%	19.0%	12.9%	1.7%
b. Honors/Gifted and Talented Education	10.9%	58.9%	14.9%	12.4%	2.9%
c. Special Education	12.1%	43.1%	33.6%	9.2%	2.0%
d. Head Start and Even Start programs	8.6%	45.7%	38.5%	6.0%	1.2%
e. Dyslexia program	4.0%	29.6%	50.0%	12.4%	4.0%
f. Student mentoring program	5.2%	37.6%	35.3%	18.7%	3.2%
g. Advanced placement program	6.6%	48.3%	30.5%	12.6%	2.0%
h. Literacy program	6.3%	43.4%	39.1%	10.1%	1.2%
i. Programs for students at risk of dropping out of school	6.3%	27.3%	36.2%	22.1%	8.1%
j. Summer school programs	5.5%	46.6%	33.3%	12.4%	2.3%
k. Alternative education programs	5.2%	36.8%	42.8%	12.4%	2.9%
l. "English as a second language" program	5.5%	37.4%	47.7%	7.8%	1.7%
m. Career counseling program	6.0%	33.1%	36.8%	19.0%	4.9%
n. College counseling program	6.3%	33.3%	35.6%	19.3%	5.5%
o. Counseling the parents of students	7.5%	33.6%	29.0%	22.7%	7.2%
p. Drop out prevention program	4.9%	26.7%	40.8%	19.5%	8.1%
11. Parents are immediately notified if a child is absent from school.	20.1%	43.4%	14.4%	14.4%	7.8%
12. Teacher turnover is low.	6.3%	33.1%	40.8%	16.4%	3.5%
13. Highly qualified teachers fill job openings.	6.6%	39.4%	23.0%	24.7%	6.3%
14. A substitute teacher rarely teaches my child.	8.1%	48.6%	14.9%	23.3%	5.2%
15. Teachers are knowledgeable in the subject areas they teach.	13.2%	60.6%	13.5%	11.2%	1.4%
16. All schools have equal access to educational materials such as computers, television monitors, science labs, and art classes.	8.9%	38.5%	13.5%	26.4%	12.4%
17. Students have access, when needed, to a school nurse.	17.8%	67.2%	4.0%	8.3%	2.6%
18. Classrooms are seldom left unattended.	12.6%	52.3%	23.0%	9.2%	2.9%
19. The district provides a high quality education.	10.3%	50.3%	12.6%	20.1%	6.6%
20. The district has a high quality of teachers.	9.2%	52.0%	17.5%	16.7%	4.6%

C. COMMUNITY INVOLVEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
21. The district regularly communicates with parents.	7.5%	44.3%	13.2%	28.2%	6.9%
22. District facilities are open for community use.	5.8%	39.4%	34.2%	16.7%	4.0%
23. Schools have plenty of volunteers to help student and school programs.	7.2%	32.5%	23.9%	28.5%	8.1%

D. FACILITIES USE AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
24. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	4.6%	27.0%	33.1%	25.9%	9.5%
25. Schools are clean.	16.1%	64.1%	5.8%	10.1%	4.0%
26. Buildings are maintained in a timely manner.	11.2%	59.8%	12.4%	12.4%	4.3%
27. Repairs are made in a timely manner.	8.1%	50.3%	23.9%	13.5%	4.3%
28. The district uses very few portable buildings.	5.8%	40.2%	19.5%	27.3%	7.2%
29. Emergency maintenance is handled expeditiously.	10.1%	43.1%	39.4%	6.3%	1.2%

E. ASSET AND RISK MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
30. My property tax bill is reasonable for the educational services delivered.	3.7%	35.3%	25.6%	25.3%	10.1%
31. Board members and administrators do a good job explaining the use of tax dollars.	2.0%	24.4%	32.5%	30.5%	10.6%

F. FINANCIAL MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
32. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	4.0%	23.6%	52.9%	15.2%	4.3%
33. Campus administrators are well-trained in fiscal management techniques.	5.2%	27.6%	54.3%	9.5%	3.5%
34. The district's financial reports are easy to understand and read.	3.5%	18.4%	53.5%	19.8%	4.9%
35. Financial reports are made available to community members when asked.	4.0%	23.0%	60.1%	10.6%	2.3%

G. PURCHASING AND WAREHOUSING

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
36. Students are issued textbooks in a timely manner.	9.5%	61.8%	8.9%	14.1%	5.8%
37. Textbooks are in good shape.	10.3%	65.2%	11.2%	9.2%	4.0%
38. The school library meets student needs for books and other resources.	9.5%	54.3%	12.9%	17.5%	5.8%

H. FOOD SERVICES

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
39. My child regularly purchases his/her meal from the cafeteria.	23.3%	44.3%	6.3%	16.1%	10.1%
40. The school breakfast program is available to all children.	23.3%	52.3%	17.5%	4.9%	2.0%
41. The cafeteria's food looks and tastes good.	8.9%	40.5%	15.5%	21.6%	13.5%
42. Food is served warm.	9.1%	57.1%	18.2%	11.7%	3.9%
43. Students have enough time to eat.	5.5%	37.9%	6.3%	26.7%	23.6%
44. Students eat lunch at the appropriate time of day.	6.6%	51.4%	4.3%	19.8%	17.8%
45. Students wait in food lines no longer than 10 minutes	7.2%	38.5%	17.2%	19.5%	17.5%
46. Discipline and order are maintained in the school cafeteria.	6.3%	58.3%	19.0%	10.1%	6.3%
47. Cafeteria staff is helpful and friendly.	10.3%	55.5%	20.1%	10.6%	3.5%
48. Cafeteria facilities are sanitary and neat.	12.6%	68.4%	12.9%	4.3%	1.7%

I. TRANSPORTATION

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
49. My child regularly rides the bus.	11.2%	20.7%	24.7%	19.8%	23.3%
50. The bus driver maintains discipline on the bus.	7.8%	23.9%	62.1%	3.5%	2.9%
51. The length of the student's bus ride is reasonable.	3.5%	16.4%	55.5%	13.2%	11.5%
52. The drop-off zone at the school is safe.	10.1%	39.4%	44.0%	4.3%	2.3%
53. The bus stop near my house is safe.	10.9%	34.8%	48.6%	4.0%	1.7%
54. The bus stop is within walking distance from our home.	12.1%	33.3%	49.4%	3.2%	2.0%
55. Buses arrive and depart on time.	8.1%	27.0%	54.6%	7.2%	3.2%
56. Buses arrive early enough for students to eat breakfast at school.	5.5%	17.2%	61.5%	10.1%	5.8%
57. Buses seldom break down.	5.2%	26.7%	62.1%	3.5%	2.6%
58. Buses are clean.	6.0%	29.6%	59.5%	3.7%	1.2%
59. Bus drivers allow students to sit down before taking off.	8.1%	29.6%	59.2%	1.2%	2.0%
60. The district has a simple method to request buses for special events.	4.9%	20.7%	69.3%	3.2%	2.0%

J. SAFETY AND SECURITY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
61. Students feel safe and secure at school.	8.1%	51.7%	6.0%	22.7%	11.2%
62. School disturbances are infrequent.	8.1%	44.8%	10.6%	24.7%	11.8%
63. Gangs are not a problem in this district.	6.3%	18.7%	17.8%	34.5%	22.7%
64. Drugs are not a problem in this district.	5.2%	18.4%	15.2%	34.5%	26.7%
65. Vandalism is not a problem in this district.	4.0%	18.7%	21.6%	36.2%	19.5%
66. Security personnel have a good working relationship with principals and teachers.	9.5%	45.1%	36.2%	6.9%	2.3%
67. Security personnel are respected and liked by the students they serve.	6.3%	39.7%	31.9%	16.1%	6.0%
68. A good working arrangement exists between the local law enforcement and the district.	10.3%	51.2%	30.8%	4.9%	2.9%
69. Students receive fair and equitable discipline for misconduct.	6.9%	40.8%	19.3%	20.4%	12.6%
70. Safety hazards do not exist on school grounds.	4.9%	34.5%	25.6%	23.9%	11.2%

K. COMPUTERS AND TECHNOLOGY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
71. Teachers know how to teach computer science and other technology-related courses.	10.3%	53.5%	25.0%	8.9%	2.3%
72. Computers are new enough to be useful to teach students.	10.9%	56.3%	14.1%	13.5%	5.2%
73. The district meets student needs in computer fundamentals.	8.6%	55.5%	17.2%	15.5%	3.2%
74. The district meets student needs in advanced computer skills.	7.2%	42.2%	25.6%	19.8%	5.2%
75. Students have easy access to the Internet.	7.5%	48.9%	26.4%	14.1%	3.2%

DISTRICT ADMINISTRATIVE AND SUPPORT STAFF SURVEY RESULTS

(WRITTEN/SELF-ADMINISTERED)
(N=192)

Note: Totals may not equal 100 percent due to rounding.

PART A: DEMOGRAPHIC DATA

STATEMENT	FEMALE	MALE	NO RESPONSE
1. Gender (Optional)	83.0%	9.8%	7.2%

STATEMENT	AFRICAN AMERICAN	ANGLO	ASIAN	HISPANIC	OTHER	NO RESPONSE
2. Ethnicity (Optional)	3.6%	54.6%	0.5%	27.8%	3.1%	9.8%

STATEMENT	1-5 YEARS	6-10 YEARS	11-15 YEARS	16-20 YEARS	20+ YEARS	NO RESPONSE
3. How long have you been employed by Victoria ISD?	27.8%	23.2%	17.5%	10.8%	19.6%	1.0%

STATEMENT	ADMINISTRATOR	CLERICAL STAFF	SUPPORT STAFF	NO RESPONSE
4. Are you a(n):	25.3%	24.7%	46.9%	3.1%

STATEMENT	1-5 YEARS	6-10 YEARS	11-15 YEARS	16-20 YEARS	20+ YEARS	NO RESPONSE
5. How long have you been employed in this capacity by Victoria ISD?	33.5%	25.3%	17.0%	8.8%	12.4%	3.1%

PART B: SURVEY QUESTIONS

A. DISTRICT ORGANIZATION AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
1. The school board allows sufficient time for public input at meetings.	16.5%	40.2%	32.5%	9.3%	1.6%
2. School board members listen to the opinions and desires of others.	8.8%	42.8%	22.2%	22.2%	4.1%
3. The superintendent is a respected and effective instructional leader.	25.3%	40.7%	20.6%	9.3%	4.1%
4. The superintendent is a respected and effective business manager.	23.7%	36.1%	25.3%	11.3%	3.6%
5. Central administration is efficient.	13.9%	43.8%	16.0%	20.6%	5.7%
6. Central administration supports the educational process.	17.5%	49.5%	17.5%	11.9%	3.6%
7. The morale of central administration staff is good.	10.8%	43.3%	31.4%	12.4%	2.1%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
8. Education is the main priority in our school district.	30.4%	43.3%	7.2%	16.0%	3.1%
9. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	12.9%	39.7%	30.4%	16.5%	0.5%
10. The needs of the college-bound student are being met.	8.8%	44.3%	32.5%	12.4%	2.1%
11. The needs of the work-bound student are being met.	9.8%	36.6%	32.5%	19.1%	2.1%
12. The district has effective educational programs for the following:					
a. Reading	20.1%	50.5%	20.6%	6.7%	2.1%
b. Writing	17.0%	53.1%	20.6%	7.7%	1.6%
c. Mathematics	18.0%	52.1%	20.1%	8.8%	1.0%
d. Science	15.0%	50.5%	25.3%	8.8%	0.5%

**B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT
(CONTINUED)**

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
e. English or Language Arts	16.0%	54.1%	22.7%	6.2%	1.0%
f. Computer Instruction	14.4%	50.5%	19.6%	12.9%	2.6%
g. Social Studies (history or geography)	12.9%	53.6%	24.2%	8.8%	0.5%
h. Fine Arts	11.9%	49.5%	25.3%	9.3%	4.1%
i. Physical Education	13.9%	54.1%	22.2%	7.7%	2.1%
j. Business Education	10.3%	45.4%	33.5%	9.8%	1.0%
k. Vocational (Career and Technology) Education	11.3%	47.4%	27.3%	11.9%	2.1%
l. Foreign Language	10.3%	46.9%	30.4%	10.8%	1.6%
13. The district has effective special programs for the following:					
a. Library Service	10.3%	40.7%	36.6%	11.3%	1.0%
b. Honors/Gifted and Talented Education	16.0%	51.0%	23.2%	9.3%	0.5%
c. Special Education	18.6%	47.9%	20.1%	11.3%	2.1%
d. Head Start and Even Start programs	17.5%	47.4%	30.9%	4.1%	0.0%
e. Dyslexia program	13.4%	34.0%	34.5%	13.4%	4.6%
f. Student mentoring program	7.2%	34.0%	40.2%	15.5%	3.1%
g. Advanced placement program	12.4%	37.1%	38.7%	10.3%	1.6%
h. Literacy program	10.8%	39.2%	40.7%	5.7%	3.6%
i. Programs for students at risk for dropping out of school	12.4%	37.6%	27.3%	18.6%	4.1%
j. Summer school programs	13.4%	52.6%	25.8%	8.3%	0.0%
k. Alternative education programs	12.9%	46.9%	27.3%	8.8%	4.1%
l. "English as a Second Language" program	8.8%	44.9%	32.0%	11.9%	2.6%
m. Career counseling program	9.8%	33.0%	36.1%	20.6%	0.5%
n. College counseling program	9.8%	35.6%	35.1%	19.1%	0.5%
o. Counseling the parents of students	10.8%	23.7%	36.6%	25.3%	3.6%
p. Drop out prevention program	8.3%	32.0%	34.0%	22.7%	3.1%
14. Parents are immediately notified if a child is absent from school.	12.9%	37.6%	25.8%	16.5%	7.2%
15. Teacher turnover is low.	5.7%	26.8%	34.0%	25.8%	7.7%
16. Highly qualified teachers fill job openings.	6.7%	33.0%	25.8%	28.4%	6.2%
17. Teacher openings are filled quickly.	10.3%	40.2%	25.8%	19.1%	4.6%
18. Teachers are rewarded for superior performance.	3.6%	16.0%	30.9%	33.5%	16.0%
19. Teachers are counseled about less than satisfactory performance.	5.2%	27.8%	42.3%	20.6%	4.1%
20. All schools have equal access to educational materials such as computers, television monitors, science labs, and art classes.	10.8%	26.8%	20.1%	29.4%	12.9%
21. The student-to-teacher ratio is reasonable.	7.7%	35.6%	18.6%	28.4%	9.8%
22. Students have access, when needed, to a school nurse.	20.1%	60.8%	13.4%	5.2%	0.5%
23. Classrooms are seldom left unattended.	11.9%	46.4%	27.3%	11.9%	2.6%

C. PERSONNEL MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
24. District salaries are competitive with similar positions in the job market.	1.0%	15.0%	14.4%	46.4%	23.2%
25. The district has a good and timely program for orienting new employees.	7.7%	38.1%	27.3%	21.1%	5.7%
26. Temporary workers are rarely used.	5.7%	29.9%	29.9%	30.4%	4.1%
27. The district successfully projects future staffing needs.	3.6%	22.2%	38.1%	26.8%	9.3%
28. The district has an effective employee recruitment program.	3.6%	24.2%	38.1%	27.3%	6.7%
29. The district operates an effective staff development program.	10.3%	42.3%	25.3%	15.5%	6.7%

C. PERSONNEL MANAGEMENT (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
30. District employees receive annual personnel evaluations.	19.6%	57.7%	11.3%	7.7%	3.6%
31. The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	4.6%	16.5%	19.1%	36.1%	23.7%
32. Employees who perform below the standard of expectation are counseled appropriately and timely.	4.1%	26.3%	26.8%	29.4%	13.4%
33. The district has a fair and timely grievance process.	7.2%	31.4%	47.9%	10.8%	2.6%
34. The district's health insurance package meets my needs.	2.6%	33.0%	11.9%	30.4%	22.2%

D. COMMUNITY INVOLVEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
35. The district regularly communicates with parents.	10.8%	47.9%	19.6%	18.6%	3.1%
36. The local television and radio stations regularly report school news and menus.	11.3%	60.3%	11.3%	12.4%	4.6%
37. Schools have plenty of volunteers to help student and school programs.	7.7%	22.2%	29.4%	32.0%	8.8%
38. District facilities are open for community use.	10.8%	44.3%	33.0%	8.8%	3.1%

E. FACILITIES USE AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
39. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	5.7%	28.4%	35.6%	25.3%	5.2%
40. The architect and construction managers are selected objectively and impersonally.	4.6%	20.6%	64.4%	7.7%	2.6%
41. Schools are clean.	17.5%	54.1%	9.3%	13.4%	5.7%
42. Buildings are properly maintained in a timely manner.	13.4%	40.7%	9.8%	24.7%	11.3%
43. Repairs are made in a timely manner.	11.3%	36.1%	11.3%	30.9%	10.3%
44. Emergency maintenance is handled promptly.	18.6%	52.1%	13.4%	12.4%	3.6%

F. FINANCIAL MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
45. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	6.7%	33.0%	44.3%	8.8%	7.2%
46. Campus administrators are well trained in fiscal management techniques.	7.7%	33.0%	40.2%	12.4%	6.7%
47. The district's financial reports are easy to understand and read.	6.2%	25.8%	49.0%	17.0%	2.1%
48. Financial reports are made available to community members when asked.	7.2%	27.8%	58.3%	5.7%	1.0%

G. PURCHASING AND WAREHOUSING

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
49. Purchasing gets me what I need when I need it.	9.3%	48.5%	22.2%	16.5%	3.6%
50. Purchasing acquires the highest quality materials and equipment at the lowest cost.	9.8%	35.1%	29.9%	21.7%	3.6%

G. PURCHASING AND WAREHOUSING (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
51. Purchasing processes are not cumbersome for the requestor.	9.3%	38.7%	32.0%	18.0%	2.1%
52. The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	14.4%	49.5%	25.8%	6.7%	3.6%
53. Students are issued textbooks in a timely manner.	10.3%	41.8%	32.0%	9.3%	6.7%
54. Textbooks are in good shape.	8.3%	52.1%	28.4%	7.7%	3.6%
55. The school library meets students' needs for books and other resources.	10.3%	43.8%	25.8%	15.5%	4.6%

H. SAFETY AND SECURITY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
56. Gangs are not a problem in this district.	2.6%	11.9%	19.6%	46.9%	19.1%
57. Drugs are not a problem in this district.	0.5%	11.9%	16.5%	45.4%	25.8%
58. Vandalism is not a problem in this district.	1.0%	16.5%	17.0%	47.4%	18.0%
59. Security personnel have a good working relationship with principals and teachers.	6.7%	43.3%	34.0%	8.8%	7.2%
60. Security personnel are respected and liked by the students they serve.	4.1%	35.1%	44.3%	10.3%	6.2%
61. A good working arrangement exists between the local law enforcement and the district.	12.9%	56.2%	24.2%	4.6%	2.1%
62. Students receive fair and equitable discipline for misconduct.	9.3%	28.9%	21.1%	28.4%	12.4%

I. COMPUTERS AND TECHNOLOGY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
63. Students regularly use computers.	18.6%	53.1%	12.4%	12.9%	3.1%
64. Students have regular access to computer equipment and software in the classroom.	10.8%	47.4%	18.6%	19.1%	4.1%
65. Teachers know how to use computers in the classroom.	12.4%	45.9%	20.6%	18.6%	2.6%
66. Computers are new enough to be useful for student instruction.	9.8%	51.0%	19.6%	15.5%	4.1%
67. The district meets students' needs in computer fundamentals.	9.3%	49.0%	22.2%	16.0%	3.6%
68. The district meets students' needs in advanced computer skills.	7.2%	35.6%	36.1%	16.5%	4.6%
69. Teachers and students have easy access to the Internet.	15.0%	54.6%	20.6%	7.7%	2.1%

PRINCIPAL AND ASSISTANT PRINCIPAL SURVEY RESULTS

(N = 23)

Note: Totals may not add to 100 percent due to rounding.

PART A: DEMOGRAPHIC DATA

STATEMENT	CATEGORY		
	NO RESPONSE	MALE	FEMALE
1. Gender (Optional)	7.6%	27.9%	64.5%

STATEMENT	CATEGORY					
	ANGLO	AFRICAN-AMERICAN	HISPANIC	ASIAN	OTHER	NO RESPONSE
2. Ethnicity (Optional)	48.7%	15.4%	28.2%	0.0%	2.6%	5.1%

STATEMENT	CATEGORY				
	1-5 YEARS	6-10 YEARS	11-15 YEARS	16-20 YEARS	20+ YEARS
3. How long have you been employed by Victoria ISD?	13.2%	15.8%	28.9%	15.8%	26.3%

STATEMENT	CATEGORY					
	GRADE LEVEL		GRADE LEVEL		GRADE LEVEL	
4. What grades are taught in your school?	Pre-K to 5th	80.4%	6 th to 8th	8.8%	9 th to 12 th	10.8%

PART B: SURVEY QUESTIONS

A. DISTRICT ORGANIZATION AND MANAGEMENT

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
1. The school board allows sufficient time for public input at meetings.	30.8%	59.0%	5.1%	5.1%	0.0%	0.0%
2. School board members listen to the opinions and desires of others.	20.5%	41.0%	10.3%	23.1%	5.1%	0.0%
3. School board members understand their role as policymakers and stay out of the day-to-day management of the district.	10.3%	25.6%	17.9%	30.8%	15.4%	0.0%
4. The superintendent is a respected and effective instructional leader.	46.2%	38.5%	5.1%	7.7%	2.6%	0.0%
5. The superintendent is a respected and effective business manager.	43.6%	48.7%	0.0%	5.1%	2.6%	0.0%
6. Central administration is efficient.	17.9%	59.0%	7.7%	10.3%	2.6%	2.6%
7. Central administration supports the educational process.	17.9%	64.1%	5.1%	10.3%	0.0%	2.6%
8. The morale of central administration staff is good.	15.4%	51.3%	20.5%	10.3%	2.6%	0.0%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
9. Education is the main priority in our school district.	46.2%	41.0%	2.6%	7.7%	2.6%	0.0%
10. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	20.5%	74.4%	0.0%	5.1%	0.0%	0.0%
11. The needs of the college-bound student are being met.	10.3%	35.9%	17.9%	28.2%	2.6%	5.1%

**B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT
(CONTINUED)**

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
12. The needs of the work-bound student are being met.	5.1%	25.6%	28.2%	30.8%	5.1%	5.1%
13. The district provides curriculum guides for all grades and subjects.	38.5%	56.4%	0.0%	2.6%	2.6%	0.0%
14. The curriculum guides are appropriately aligned and coordinated.	46.2%	46.2%	0.0%	5.1%	2.6%	0.0%
15. The district's curriculum guides clearly outline what to teach and how to teach it.	35.9%	46.2%	0.0%	15.4%	2.6%	0.0%
16. The district has effective educational programs for the following:						
a. Reading	23.1%	69.2%	2.6%	5.1%	0.0%	0.0%
b. Writing	17.9%	71.8%	2.6%	7.7%	0.0%	0.0%
c. Mathematics	12.8%	69.2%	0.0%	15.4%	2.6%	0.0%
d. Science	7.7%	61.5%	0.0%	30.8%	0.0%	0.0%
e. English or Language Arts	17.9%	79.5%	2.6%	0.0%	0.0%	0.0%
f. Computer Instruction	2.6%	38.5%	17.9%	35.9%	5.1%	0.0%
g. Social Studies (history or geography)	10.3%	69.2%	10.3%	10.3%	0.0%	0.0%
h. Fine Arts	2.6%	53.8%	15.4%	23.1%	5.1%	0.0%
i. Physical Education	5.1%	74.4%	5.1%	12.8%	2.6%	0.0%
j. Business Education	5.1%	46.2%	43.6%	5.1%	0.0%	0.0%
k. Vocational (Career and Technology) Education	5.1%	41.0%	30.8%	17.9%	5.1%	0.0%
l. Foreign Language	2.6%	59.0%	28.2%	10.3%	0.0%	0.0%
17. The district has effective special programs for the following:						
a. Library Service	2.6%	64.1%	17.9%	10.3%	5.1%	0.0%
b. Honors/Gifted and Talented Education	5.1%	61.5%	7.7%	23.1%	2.6%	0.0%
c. Special Education	17.9%	71.8%	0.0%	10.3%	0.0%	0.0%
d. Head Start and Even Start programs	7.7%	66.7%	15.4%	10.3%	0.0%	0.0%
e. Dyslexia program	12.8%	64.1%	0.0%	20.5%	2.6%	0.0%
f. Student mentoring program	2.6%	28.2%	20.5%	43.6%	5.1%	0.0%
g. Advanced placement program	2.6%	64.1%	17.9%	15.4%	0.0%	0.0%
h. Literacy program	2.6%	69.2%	12.8%	15.4%	0.0%	0.0%
i. Programs for students at risk for dropping out of school	5.1%	41.0%	10.3%	30.8%	12.8%	0.0%
j. Summer school programs	7.7%	41.0%	15.4%	25.6%	10.3%	0.0%
k. Alternative education programs	12.8%	48.7%	10.3%	23.1%	5.1%	0.0%
l. "English as a Second Language" program	2.6%	56.4%	7.7%	30.8%	2.6%	0.0%
m. Career counseling program	5.1%	38.5%	28.2%	23.1%	5.1%	0.0%
n. College counseling program	2.6%	38.5%	33.3%	20.5%	5.1%	0.0%
o. Counseling the parents of students	0.0%	41.0%	28.2%	17.9%	12.8%	0.0%
p. Drop out prevention program	0.0%	33.3%	20.5%	33.3%	12.8%	0.0%
18. Parents are immediately notified if a child is absent from school.	15.4%	41.0%	10.3%	30.8%	2.6%	0.0%
19. Teacher turnover is low.	5.1%	46.2%	10.3%	33.3%	5.1%	0.0%
20. Highly qualified teachers fill job openings.	2.6%	59.0%	10.3%	23.1%	2.6%	2.6%
21. Teachers are rewarded for superior performance.	2.6%	28.2%	10.3%	43.6%	12.8%	2.6%
22. Teachers are counseled about less than satisfactory performance.	7.7%	59.0%	2.6%	23.1%	2.6%	5.1%

**B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT
(CONTINUED)**

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
23. All schools have equal access to educational materials such as computers, television monitors, science labs and art classes.	0.0%	25.6%	2.6%	41.0%	28.2%	2.6%
24. Students have access, when needed, to a school nurse.	20.5%	71.8%	0.0%	5.1%	0.0%	2.6%
25. Classrooms are seldom left unattended.	5.1%	69.2%	2.6%	20.5%	0.0%	2.6%

C. PERSONNEL

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
26. District salaries are competitive with similar positions in the job market.	0.0%	5.1%	2.6%	25.6%	64.1%	2.6%
27. The district has a good and timely program for orienting new employees.	5.1%	74.4%	7.7%	7.7%	0.0%	5.1%
28. Temporary workers are rarely used.	2.6%	51.3%	30.8%	7.7%	5.1%	2.6%
29. The district successfully projects future staffing needs.	2.6%	48.7%	12.8%	23.1%	10.3%	2.6%
30. The district has an effective employee recruitment program.	0.0%	5.1%	2.6%	25.6%	64.1%	2.6%
31. The district operates an effective staff development program.	25.6%	56.4%	2.6%	10.3%	2.6%	2.6%
32. District employees receive annual personnel evaluations.	17.9%	76.9%	2.6%	0.0%	0.0%	2.6%
33. The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	0.0%	17.9%	12.8%	38.5%	28.2%	2.6%
34. Employees who perform below the standard of expectation are counseled appropriately and timely.	0.0%	51.3%	7.7%	35.9%	2.6%	2.6%
35. The district has a fair and timely grievance process.	2.6%	82.1%	10.3%	2.6%	0.0%	2.6%
36. The district's health insurance package meets my needs.	0.0%	15.4%	5.1%	35.9%	38.5%	5.1%

D. COMMUNITY INVOLVEMENT

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
37. The district regularly communicates with parents.	12.8%	51.3%	7.7%	25.6%	0.0%	2.6%
38. Schools have plenty of volunteers to help student and school programs.	0.0%	43.6%	7.7%	43.6%	2.6%	2.6%
39. District facilities are open for community use.	20.5%	69.2%	5.1%	0.0%	2.6%	2.6%

E. FACILITIES USE AND MANAGEMENT

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
40. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	10.3%	33.3%	20.5%	28.2%	2.6%	5.1%
41. Schools are clean.	15.4%	53.8%	5.1%	23.1%	0.0%	2.6%
42. Buildings are properly maintained in a timely manner.	20.5%	59.0%	0.0%	15.4%	2.6%	2.6%

E. FACILITIES USE AND MANAGEMENT (CONTINUED)

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
43. Repairs are made in a timely manner.	15.4%	64.1%	2.6%	12.8%	2.6%	2.6%
44. Emergency maintenance is handled promptly.	23.1%	69.2%	2.6%	0.0%	2.6%	2.6%

F. FINANCIAL MANAGEMENT

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
45. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	20.5%	66.7%	2.6%	5.1%	2.6%	2.6%
46. Campus administrators are well trained in fiscal management techniques.	17.9%	46.2%	7.7%	25.6%	0.0%	2.6%
47. Financial resources are allocated fairly and equitably at my school.	17.9%	56.4%	5.1%	12.8%	5.1%	2.6%

G. PURCHASING AND WAREHOUSING

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
48. Purchasing gets me what I need when I need it.	7.7%	69.2%	7.7%	7.7%	5.1%	2.6%
49. Purchasing acquires high-quality materials and equipment at the lowest cost.	5.1%	61.5%	10.3%	20.5%	0.0%	2.6%
50. Purchasing processes are not cumbersome for the requestor.	5.1%	66.7%	5.1%	15.4%	2.6%	5.1%
51. The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	7.7%	74.4%	5.1%	10.3%	0.0%	2.6%
52. Students are issued textbooks in a timely manner.	7.7%	76.9%	2.6%	5.1%	5.1%	2.6%
53. Textbooks are in good shape.	7.7%	82.1%	2.6%	5.1%	0.0%	2.6%
54. The school library meets students' needs for books and other resources.	10.3%	59.0%	5.1%	17.9%	5.1%	2.6%

H. FOOD SERVICES

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
55. The cafeteria's food looks and tastes good.	2.6%	48.7%	5.1%	28.2%	15.4%	0.0%
56. Food is served warm.	7.7%	71.8%	7.7%	5.1%	7.7%	0.0%
57. Students have enough time to eat.	20.5%	79.5%	0.0%	0.0%	0.0%	0.0%
58. Students eat lunch at the appropriate time of day.	20.5%	74.4%	2.6%	2.6%	0.0%	0.0%
59. Students wait in food lines no longer than 10 minutes.	28.2%	66.7%	2.6%	2.6%	0.0%	0.0%
60. Discipline and order are maintained in the school cafeteria.	7.7%	76.9%	7.7%	7.7%	0.0%	0.0%
61. Cafeteria staff is helpful and friendly.	28.2%	59.0%	7.7%	2.6%	2.6%	0.0%
62. Cafeteria facilities are sanitary and neat.	35.9%	56.4%	2.6%	0.0%	5.1%	0.0%

I. TRANSPORTATION

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
63. The drop-off zone at the school is safe.	23.1%	66.7%	0.0%	7.7%	2.6%	0.0%
64. The district has a simple method to request buses for special events.	20.5%	74.4%	2.6%	2.6%	0.0%	0.0%
65. Buses arrive and leave on time..	15.4%	69.2%	0.0%	5.1%	10.3%	0.0%
66. Adding or modifying a route for a student is easy to accomplish.	7.7%	56.4%	12.8%	17.9%	5.1%	0.0%

J. SAFETY AND SECURITY

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
67. Students feel safe and secure at school.	7.7%	79.5%	5.1%	7.7%	0.0%	0.0%
68. School disturbances are infrequent.	12.8%	59.0%	7.7%	20.5%	0.0%	0.0%
69. Gangs are not a problem in this district.	0.0%	17.9%	12.8%	46.2%	23.1%	0.0%
70. Drugs are not a problem in this district.	0.0%	10.3%	2.6%	51.3%	35.9%	0.0%
71. Vandalism is not a problem in this district.	0.0%	12.8%	5.1%	59.0%	23.1%	0.0%
72. Security personnel have a good working relationship with principals and teachers.	5.1%	56.4%	28.2%	5.1%	5.1%	0.0%
73. Security personnel are respected and liked by the students they serve.	0.0%	43.6%	43.6%	12.8%	0.0%	0.0%
74. A good working arrangement exists between local law enforcement and the district.	20.5%	61.5%	15.4%	2.6%	0.0%	0.0%
75. Students receive fair and equitable discipline for misconduct.	17.9%	59.0%	7.7%	10.3%	2.6%	2.6%
76. Safety hazards do not exist on school grounds.	0.0%	64.1%	7.7%	23.1%	5.1%	0.0%

K. COMPUTERS AND TECHNOLOGY

SURVEY QUESTIONS	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
77. Students regularly use computers.	7.7%	53.8%	2.6%	30.8%	5.1%	0.0%
78. Students have regular access to computer equipment and software in the classroom.	7.7%	48.7%	2.6%	30.8%	10.3%	0.0%
79. Computers are new enough to be useful for student instruction.	2.6%	43.6%	7.7%	25.6%	20.5%	0.0%
80. The district meets students' needs in computer fundamentals.	2.6%	35.9%	7.7%	38.5%	15.4%	0.0%
81. The district meets students' needs in advanced computer skills.	2.6%	15.4%	12.8%	48.7%	20.5%	0.0%
82. Teachers know how to use computers in the classroom.	0.0%	61.5%	5.1%	28.2%	5.1%	0.0%
83. Teachers and students have easy access to the Internet.	10.3%	59.0%	5.1%	23.1%	2.6%	0.0%

TEACHER SURVEY RESULTS

(WRITTEN/SELF-ADMINISTERED)

(N=144)

Note: Totals may not add to 100 percent due to rounding.

PART A. DEMOGRAPHIC DATA

STATEMENT	FEMALE	MALE	NO RESPONSE
1. Gender (Optional)	87.7%	8.1%	4.2%

STATEMENT	AFRICAN-AMERICAN	ANGLO	HISPANIC	OTHER	NO RESPONSE
2. Ethnicity (Optional)	3.4%	74.6%	14.0%	2.1%	5.9%

STATEMENT	1-5 YEARS	6-10 YEARS	11-15 YEARS	16-20 YEARS	20+ YEARS	NO RESPONSE
3. How long have you been employed by Victoria ISD?	29.2%	17.8%	20.3%	9.8%	22.5%	0.4%

STATEMENT	GRADE LEVEL	GRADE LEVEL	GRADE LEVEL	
4. What grade (s) do you teach this year?	Pre-Kindergarten	10.6%	Sixth Grade	11.9%
	Kindergarten	18.6%	Seventh Grade	12.7%
	First Grade	22.0%	Eighth Grade	11.9%
	Second Grade	18.6%	Ninth Grade	15.7%
	Third Grade	21.6%	Tenth Grade	18.2%
	Fourth Grade	21.2%	Eleventh Grade	16.1%
	Fifth Grade	19.9%	Twelfth Grade	17.0%

PART B: SURVEY QUESTIONS

A. DISTRICT ORGANIZATION AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
1. The school board allows sufficient time for public input at meetings.	10.6%	48.3%	28.8%	9.8%	2.5%
2. School board members listen to the opinions and desires of others.	5.9%	45.3%	19.1%	22.0%	7.6%
3. School board members work well with the superintendent.	5.9%	46.6%	39.8%	5.9%	1.7%
4. The school board has a good image in the community.	3.4%	36.0%	20.8%	31.4%	8.5%
5. The superintendent is a respected and effective instructional leader.	14.0%	43.6%	13.6%	20.3%	8.5%
6. The superintendent is a respected and effective business manager.	13.1%	36.4%	22.0%	21.2%	7.2%
7. Central administration is efficient.	7.2%	37.3%	14.8%	29.7%	11.0%
8. Central administration supports the educational process.	11.9%	48.7%	14.0%	17.4%	8.1%
9. The morale of central administration staff is good.	7.2%	32.2%	47.5%	8.9%	4.2%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
10. Education is the main priority in our school district.	20.3%	44.1%	5.9%	22.0%	7.6%
11. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	7.6%	40.7%	7.6%	34.3%	9.8%
12. The needs of the college-bound student are being met.	4.2%	45.3%	22.0%	20.8%	7.6%
13. The needs of the work-bound student are being met.	4.7%	36.0%	27.5%	25.0%	6.8%
14. The district provides curriculum guides for all grades and subjects.	17.0%	49.6%	11.9%	14.8%	6.8%

**B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT
(CONTINUED)**

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
15. The curriculum guides are appropriately aligned and coordinated.	16.5%	48.3%	17.0%	13.6%	4.7%
16. The district's curriculum guides clearly outline what to teach and how to teach it.	13.6%	41.1%	12.7%	25.9%	6.8%
17. The district has effective educational programs for the following:					
a. Reading	17.4%	52.1%	12.3%	15.3%	3.0%
b. Writing	11.9%	55.5%	13.1%	16.1%	3.4%
c. Mathematics	14.0%	55.5%	12.7%	15.3%	2.5%
d. Science	9.8%	53.8%	14.8%	20.3%	1.3%
e. English or Language Arts	10.2%	60.2%	16.5%	10.6%	2.5%
f. Computer Instruction	7.6%	42.8%	16.1%	29.2%	4.2%
g. Social Studies (history or geography)	8.1%	55.5%	19.1%	16.1%	1.3%
h. Fine Arts	5.5%	43.6%	22.0%	22.9%	5.9%
i. Physical Education	10.6%	55.5%	18.2%	12.7%	3.0%
j. Business Education	5.1%	32.2%	45.8%	15.7%	1.3%
k. Vocational (Career and Technology) Education	7.6%	35.2%	39.4%	15.3%	2.5%
l. Foreign Language	3.8%	40.3%	44.1%	10.6%	1.3%
18. The district has effective special programs for the following:					
a. Library Service	7.2%	41.1%	23.3%	19.9%	8.5%
b. Honors/Gifted and Talented Education	7.6%	52.1%	15.3%	20.8%	4.2%
c. Special Education	11.9%	53.8%	11.4%	16.5%	6.4%
d. Head Start and Even Start programs	11.4%	43.6%	37.7%	5.5%	1.7%
e. Dyslexia program	8.9%	47.0%	20.8%	19.1%	4.2%
f. Student mentoring program	4.2%	20.8%	44.1%	25.4%	5.5%
g. Advanced placement program	8.5%	40.3%	36.4%	10.6%	4.2%
h. Literacy program	5.9%	34.3%	43.2%	14.0%	2.5%
i. Programs for students at risk for dropping out of school	6.8%	30.1%	26.7%	27.5%	8.9%
j. Summer school programs	8.1%	50.0%	23.7%	12.7%	5.5%
k. Alternative education programs	6.4%	38.1%	30.1%	18.6%	6.8%
l. "English as a Second Language" program	5.9%	42.8%	25.4%	22.5%	3.4%
m. Career counseling program	2.1%	25.9%	43.2%	22.0%	6.8%
n. College counseling program	3.4%	27.1%	44.1%	19.1%	6.4%
o. Counseling the parents of students	2.1%	27.1%	32.2%	30.5%	8.1%
p. Drop out prevention program	3.8%	23.7%	35.2%	28.0%	9.3%
19. Parents are immediately notified if a child is absent from school.	16.1%	50.9%	8.1%	17.8%	7.2%
20. Teacher turnover is low.	4.2%	22.9%	17.0%	41.5%	14.4%
21. Highly qualified teachers fill job openings.	4.7%	35.6%	13.6%	34.3%	11.9%
22. Teacher openings are filled quickly.	7.6%	50.4%	16.5%	20.3%	5.1%
23. Teachers are rewarded for superior performance.	1.7%	6.8%	11.4%	43.2%	36.9%
24. Teachers are counseled about less-than-satisfactory performance.	3.4%	40.7%	28.8%	21.2%	5.9%
25. Teachers are knowledgeable in the subject areas they teach.	9.3%	61.4%	8.5%	16.5%	4.2%
26. All schools have equal access to educational materials such as computers, television monitors, science labs, and art classes.	4.7%	18.6%	8.5%	35.6%	32.6%
27. The students-to-teacher ratio is reasonable.	4.7%	37.7%	5.5%	33.9%	18.2%
28. Classrooms are seldom left unattended.	16.5%	64.4%	6.8%	9.8%	2.5%

C. PERSONNEL MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
29. District salaries are competitive with similar positions in the job market.	1.7%	17.4%	5.5%	43.6%	31.8%
30. The district has a good and timely program for orienting new employees.	5.5%	47.5%	19.1%	19.9%	8.1%
31. Temporary workers are rarely used.	2.5%	27.5%	35.6%	25.4%	8.9%
32. The district successfully projects future staffing needs.	2.5%	22.0%	34.3%	30.1%	11.0%
33. The district has an effective employee recruitment program.	3.8%	20.3%	42.4%	22.5%	11.0%
34. The district operates an effective staff development program.	8.9%	44.5%	11.0%	23.7%	11.9%
35. District employees receive annual personnel evaluations.	19.9%	73.7%	4.2%	1.7%	0.4%
36. The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	2.1%	9.8%	16.1%	42.4%	29.7%
37. Employees who perform below the standard of expectation are counseled appropriately and timely.	2.1%	25.0%	37.3%	25.4%	10.2%
38. The district has a fair and timely grievance process.	3.4%	40.3%	41.1%	9.3%	5.9%
39. The district's health insurance package meets my needs.	3.0%	29.2%	5.5%	37.3%	25.0%

D. COMMUNITY INVOLVEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
40. The district regularly communicates with parents.	9.8%	59.3%	11.9%	14.8%	4.2%
41. The local television and radio stations regularly report school news and menus.	9.3%	56.8%	11.9%	17.8%	4.2%
42. Schools have plenty of volunteers to help student and school programs.	3.4%	19.1%	11.4%	47.9%	18.2%
43. District facilities are open for community use.	8.9%	50.9%	25.9%	12.3%	2.1%

E. FACILITIES USE AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
44. The district plans facilities far enough in the future to support enrollment growth.	1.7%	12.7%	14.4%	47.0%	24.2%
45. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	3.0%	25.4%	21.6%	33.9%	16.1%
46. The architect and construction managers are selected objectively and impersonally.	2.1%	18.6%	60.2%	11.0%	8.1%
47. The quality of new construction is excellent.	2.1%	30.5%	36.4%	21.6%	9.3%
48. Schools are clean.	6.4%	47.9%	5.1%	30.1%	10.6%
49. Buildings are properly maintained in a timely manner.	6.4%	47.9%	5.1%	30.1%	10.6%
50. Repairs are made in a timely manner.	3.0%	35.2%	8.1%	34.3%	19.5%
51. Emergency maintenance is handled promptly.	5.1%	50.0%	17.0%	19.5%	8.5%

F. FINANCIAL MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
52. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	7.6%	30.9%	22.0%	27.1%	12.3%
53. Campus administrators are well trained in fiscal management techniques.	7.2%	40.7%	30.5%	13.6%	8.1%
54. Financial reports are allocated fairly and equitably at my school.	8.1%	33.9%	19.9%	22.5%	15.7%

G. PURCHASING AND WAREHOUSING

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
55. Purchasing gets me what I need when I need it.	6.8%	42.0%	19.9%	23.7%	7.6%
56. Purchasing acquires the highest quality materials and equipment at the lowest cost.	3.4%	32.6%	30.5%	21.6%	11.9%
57. Purchasing processes are not cumbersome for the requestor.	3.8%	32.6%	24.6%	25.0%	14.0%
58. Vendors are selected competitively.	3.4%	32.2%	46.6%	11.0%	6.8%
59. The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	6.8%	46.2%	15.3%	23.7%	8.1%
60. Students are issued textbooks in a timely manner.	7.2%	60.2%	11.4%	15.3%	5.9%
61. Textbooks are in good shape.	5.5%	65.7%	12.7%	9.8%	6.4%
62. The school library meets students' needs for books and other resources.	11.4%	46.6%	6.8%	19.1%	16.1%

H. FOOD SERVICES

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
63. The cafeteria's food looks and tastes good.	5.1%	39.8%	20.3%	26.7%	8.1%
64. Food is served warm.	5.9%	60.6%	19.5%	9.3%	4.7%
65. Students eat lunch at the appropriate time of day.	7.2%	57.2%	5.1%	19.9%	10.6%
66. Students wait in food lines no longer than 10 minutes.	9.3%	51.3%	15.7%	17.8%	5.9%
67. Discipline and order are maintained in the school cafeteria.	5.9%	49.6%	17.4%	20.8%	6.4%
68. Cafeteria staff is helpful and friendly.	13.1%	63.1%	13.1%	8.5%	2.1%
69. Cafeteria facilities are sanitary and neat.	17.0%	64.0%	12.7%	5.1%	1.3%

I. SAFETY AND SECURITY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
70. School disturbances are infrequent.	5.5%	42.4%	3.8%	38.1%	10.2%
71. Gangs are not a problem in this district.	1.7%	14.4%	16.5%	46.2%	21.2%
72. Drugs are not a problem in this district.	0.4%	3.8%	10.6%	55.9%	29.2%
73. Vandalism is not a problem in this district.	0.9%	6.8%	7.6%	56.8%	28.0%
74. Security personnel have a good working relationship with principals and teachers.	7.6%	44.5%	35.6%	9.8%	2.5%
75. Security personnel are respected and liked by the students they serve.	4.7%	33.1%	41.5%	17.8%	3.0%
76. A good working arrangement exists between the local law enforcement and the district.	11.4%	56.4%	26.7%	5.1%	0.4%
77. Students receive fair and equitable discipline for misconduct.	6.8%	29.7%	9.8%	32.6%	21.2%
78. Safety hazards do not exist on school grounds.	5.1%	33.9%	17.8%	32.2%	11.0%

J. COMPUTERS AND TECHNOLOGY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
79. Students regularly use computers.	10.2%	44.9%	5.9%	27.5%	11.4%
80. Students have regular access to computer equipment and software in the classroom.	8.5%	34.3%	5.1%	33.1%	19.1%
81. Teachers know how to use computers in the classroom.	7.6%	55.1%	5.9%	25.0%	6.4%
82. Computers are new enough to be useful for student instruction.	7.6%	38.1%	7.2%	26.7%	20.3%
83. The district meets students' needs in computer fundamentals.	5.1%	41.5%	12.3%	25.0%	16.1%
84. The district meets students' needs in advanced computer skills.	4.7%	20.3%	31.8%	27.5%	15.7%
85. Teachers and students have easy access to the Internet.	12.7%	49.6%	4.2%	21.6%	11.9%

STUDENT SURVEY RESULTS

(N = 187)

Note: Totals may not add to 100 percent due to rounding.

PART A: DEMOGRAPHIC DATA

STATEMENT	CATEGORY		
	MALE	FEMALE	NO RESPONSE
1. Gender (Optional)	48.7%	49.7%	1.6%

STATEMENT	CATEGORY					NO RESPONSE
	ANGLO	AFRICAN-AMERICAN	HISPANIC	ASIAN	OTHER	
2. Ethnicity (Optional)	48.1%	8.6%	35.3%	3.2%	1.6%	3.2%

STATEMENT	CATEGORY		
	SOPHOMORE	SENIOR	NO RESPONSE
3. What is your classification?	50.8%	49.2%	0.0%

PART B: SURVEY QUESTIONS

A. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
1. The needs of the college-bound student are being met.	6.4%	48.1%	18.2%	23.0%	3.2%	1.1%
2. The needs of the work-bound student are being met.	6.4%	46.0%	21.9%	18.2%	4.8%	2.7%
3. The district has effective educational programs for the following:						
a. Reading	13.4%	52.4%	18.2%	12.3%	2.7%	1.1%
b. Writing	15.0%	56.1%	11.8%	13.9%	2.1%	1.1%
c. Mathematics	26.2%	54.5%	9.1%	7.5%	2.1%	0.5%
d. Science	17.1%	54.5%	9.1%	12.8%	5.9%	0.5%
e. English or Language Arts	19.3%	59.4%	10.7%	7.5%	1.6%	1.6%
f. Computer Instruction	12.3%	53.5%	19.3%	10.7%	3.7%	0.5%
g. Social Studies (history or geography)	18.2%	54.0%	15.5%	7.0%	3.7%	1.6%
h. Fine Arts	14.4%	46.0%	20.9%	11.2%	5.9%	1.6%
i. Physical Education	14.4%	46.0%	25.7%	9.1%	3.2%	1.1%
j. Business Education	9.6%	37.4%	33.2%	14.4%	4.3%	1.1%
k. Vocational (Career and Technology) Education	16.6%	39.0%	28.9%	10.2%	2.7%	2.7%
l. Foreign Language	17.6%	52.9%	10.7%	10.2%	5.9%	2.7%
4. The district has effective special programs for the following:						
a. Library Service	12.3%	41.7%	24.6%	13.9%	7.0%	0.5%
b. Honors/Gifted and Talented Education	18.7%	47.1%	19.3%	10.2%	3.2%	1.6%
c. Special Education	12.3%	41.2%	38.0%	6.4%	1.1%	1.1%
d. Student mentoring program	9.1%	33.2%	35.8%	15.0%	5.3%	1.6%
e. Advanced placement program	25.7%	49.2%	11.2%	10.2%	2.7%	1.1%
f. Career counseling program	13.9%	38.0%	27.3%	16.6%	3.2%	1.1%
g. College counseling program	17.6%	36.9%	24.1%	14.4%	5.9%	1.1%
5. Students have access, when needed, to a school nurse.	18.2%	51.3%	12.8%	11.2%	6.4%	0.0%
6. Classrooms are seldom left unattended.	15.0%	41.7%	22.5%	17.6%	3.2%	0.0%

**A. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT
(CONTINUED)**

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
7. The district provides a high quality education.	4.8%	34.8%	22.5%	28.3%	9.6%	0.0%
8. The district has high quality teachers.	7.0%	35.3%	23.0%	24.1%	10.7%	0.0%

B. FACILITIES USE AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
9. Schools are clean.	2.7%	26.7%	16.0%	29.4%	25.1%	0.0%
10. Buildings are properly maintained in a timely manner.	2.7%	28.9%	25.1%	28.3%	15.0%	0.0%
11. Repairs are made in a timely manner.	3.7%	25.1%	23.5%	29.9%	17.6%	0.0%
12. Emergency maintenance is handled timely.	4.3%	36.4%	31.6%	18.7%	9.1%	0.0%

C. PURCHASING AND WAREHOUSING

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
13. There are enough textbooks in all my classes.	4.8%	32.6%	8.6%	35.3%	18.2%	0.5%
14. Students are issued textbooks in a timely manner.	3.7%	50.8%	16.6%	15.5%	12.8%	0.5%
15. Textbooks are in good shape.	1.6%	26.7%	10.2%	32.1%	28.9%	0.5%
16. The school library meets student needs for books and other resources.	8.6%	41.2%	23.0%	13.4%	12.8%	1.1%

D. FOOD SERVICES

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
17. The school breakfast program is available to all children.	13.9%	47.1%	29.9%	7.0%	1.6%	0.5%
18. The cafeteria's food looks and tastes good.	1.1%	13.9%	20.9%	27.8%	36.4%	0.0%
19. Food is served warm.	2.1%	35.8%	27.3%	21.9%	12.8%	0.0%
20. Students have enough time to eat.	0.5%	9.6%	5.3%	26.7%	57.8%	0.0%
21. Students eat lunch at the appropriate times of the day.	2.7%	28.3%	16.6%	21.4%	31.0%	0.0%
22. Students wait in food lines no longer than 10 minutes.	5.9%	25.7%	17.6%	26.7%	23.5%	0.5%
23. Discipline and order are maintained in the school cafeteria.	4.8%	38.5%	32.1%	16.0%	8.0%	0.5%
24. Cafeteria staff is helpful and friendly.	12.3%	39.0%	27.8%	12.8%	7.0%	0.5%
25. Cafeteria facilities are sanitary and neat.	4.8%	35.3%	31.0%	19.3%	9.1%	0.5%

E. TRANSPORTATION

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
26. I regularly ride the bus.	4.8%	14.4%	33.2%	13.9%	33.2%	0.5%
27. The bus driver maintains discipline on the bus.	3.7%	17.1%	65.2%	5.9%	6.4%	1.6%
28. The length of my bus ride is reasonable.	3.7%	16.0%	64.2%	5.3%	9.6%	1.1%
29. The drop-off zone at the school is safe.	3.7%	25.7%	55.1%	7.5%	7.0%	1.1%
30. The bus stop near my house is safe.	4.3%	18.7%	67.4%	2.7%	5.9%	1.1%
31. The bus stop is within walking distance from our home.	5.3%	20.9%	66.3%	1.6%	4.8%	1.1%
32. Buses arrive and leave on time.	2.1%	10.7%	65.2%	12.8%	8.0%	1.1%
33. Buses arrive early enough for students to eat breakfast at school.	3.2%	7.0%	66.8%	9.6%	11.8%	1.6%
34. Buses seldom break down.	4.3%	14.4%	70.6%	4.3%	5.3%	1.1%
35. Buses are clean.	1.6%	10.7%	59.9%	15.0%	11.8%	1.1%
36. Bus drivers allow students to sit down before taking off.	3.7%	13.9%	66.3%	9.1%	5.9%	1.1%

F. SAFETY AND SECURITY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
37. I feel safe and secure at school.	5.3%	27.8%	15.5%	29.4%	21.4%	0.5%
38. School disturbances are infrequent.	3.2%	23.0%	23.0%	29.9%	19.8%	1.1%
39. Gangs are not a problem in this district.	4.8%	12.3%	11.8%	27.3%	43.3%	0.5%
40. Drugs are not a problem in this district.	5.9%	5.9%	8.6%	24.1%	54.5%	1.1%
41. Vandalism is not a problem in this district.	2.1%	4.3%	9.6%	35.3%	47.6%	1.1%
42. Security personnel have a good working relationship with principals and teachers.	4.3%	35.3%	31.6%	12.8%	14.4%	1.6%
43. Security personnel are respected and liked by the students they serve.	8.0%	19.8%	20.3%	22.5%	27.3%	2.1%
44. A good working arrangement exists between the local law enforcement and the district.	3.2%	24.1%	47.6%	15.0%	8.0%	2.1%
45. Students receive fair and equitable discipline for misconduct.	4.8%	23.0%	23.0%	21.9%	25.7%	1.6%
46. Safety hazards do not exist on school grounds.	3.7%	10.2%	36.9%	25.1%	21.4%	2.7%

G. COMPUTERS AND TECHNOLOGY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
47. Students have regular access to computer equipment and software in the classroom.	4.8%	28.9%	14.4%	32.1%	18.7%	1.1%
48. Teachers know how to use computers in the classroom.	8.0%	32.1%	26.2%	21.9%	10.2%	1.6%
49. Computers are new enough to be useful for student instruction.	4.3%	25.7%	19.8%	28.9%	20.3%	1.1%
50. The district offers enough classes in computer fundamentals.	3.2%	34.8%	28.3%	17.6%	14.4%	1.6%
51. The district meets student needs in advanced computer skills.	4.3%	33.2%	28.9%	17.1%	15.0%	1.6%
52. Teachers and students have easy access to the Internet.	10.2%	42.2%	17.1%	19.8%	9.6%	1.1%