

San Antonio ISD Progress Report

Introduction

In March 2000, the Comptroller of Public Accounts' Texas School Performance Review (TSPR) staff and consultants completed a comprehensive school review of the San Antonio Independent School District (SAISD). During May 2001, TSPR staff returned to assess the district's progress in implementing the recommendations.

Since 1991, TSPR has recommended nearly 5,000 ways to save taxpayers more than \$570 million over a five-year period in 52 different public school districts throughout Texas. TSPR also conducts follow-up reviews of districts that have had at least one year to implement recommendations. These 34 subsequent reviews show that almost 90 percent of TSPR's combined proposals have been acted upon, saving taxpayers more than \$97 million, with the full savings estimated to grow in the future.

Improving the Texas School Performance Review

Comptroller Carole Keeton Rylander, who took office in January 1999, consulted school district officials, parents and teachers from across Texas and carefully examined past reviews and progress reports in an effort to make the Texas School Performance Review (TSPR) more valuable, even vital, to the state's more than 1,000 school districts. With the perspective of having served as a teacher, and later a school board president, the Comptroller has vowed to steer TSPR toward being more accountable to local school districts and the communities they represent.

Comptroller Rylander began by establishing new criteria for selecting school districts for future reviews. Priority will be given to districts judged poor performing academically or financially, and to hands-on reviews that will benefit the greatest number of students. These are the school districts and children that need help the most.

Recognizing that only about 51 cents of every education dollar is spent on instruction, Comptroller Rylander's goal is to drive more of every education dollar into the classroom. In addition, no longer will school districts' best practices and exemplary models be left buried inside

individual TSPR reports. Instead, Comptroller Rylander has ordered best practices and exemplary programs to be shared quickly and systematically among all the state's school districts, and with anyone who requests such information. There is simply no reason for a district that has solved a problem well to keep the solution to itself. Comptroller Rylander has directed TSPR to serve as an active clearinghouse of the best and brightest ideas in Texas public education. Best practices identified in the original review of SAISD will be included in the Comptroller's best practices database, A+ Ideas for Managing Schools (AIMS), which is accessible on the web at www.aimsdatabase.org.

Under Comptroller Rylander's approach, the TSPR team and consultants will work with districts to:

- ensure students and teachers receive the support and resources necessary to succeed;
- identify innovative options to address core management challenges;
- ensure administrative activities are performed efficiently, without duplication and in a manner that enhances education;
- develop strategies to ensure the districts' processes and programs are continually assessed and improved;
- understand the link between the districts' functional areas and determine ways to provide a seamless system of services;
- challenge any process, procedure, program or policy that impedes instruction and recommend ways to reduce or eliminate obstacles; and
- put goods and services to the "Yellow Pages test," which says government should do no job if there is a business in the Yellow Pages that can do that job better and at a lower cost.

Finally, Comptroller Rylander has opened her door to Texans who share her optimism about TSPR's potential. Suggestions to improve school reviews are welcome at any time. The Comptroller is a staunch believer in public education and public accountability.

Detailed information can be obtained from TSPR by calling 1-800-531-5441 extension 5-3676, or by visiting the Comptroller's Web site at www.window.state.tx.us.

TSPR in San Antonio Independent School District

In September 1999, the Comptroller's office began an unprecedented second performance review of the San Antonio Independent School District (SAISD). The first review, conducted in 1991, was performed as part of a pilot study of districts. In keeping with her pledge to give priority to districts judged poor performing academically or financially, and to reviews that will benefit the greatest number of students, Comptroller Carole Keeton Rylander selected the SAISD for review after a number of key indicators signaled that financial and management-related problems plagued the district.

During its six-month review of the district, TSPR developed 154 recommendations to improve operations and save taxpayers nearly \$28.3 million by 2004-2005. Cumulative net savings from all recommendations (savings less recommended investments) would reach more than \$25.1 million by 2004-05.

The TSPR team interviewed district employees, school board members, parents, business leaders, and community members and held community meetings in SAISD's eight high schools. To obtain additional comments, the review team conducted focus group sessions with parents, teachers, principals, business leaders and representatives from community organizations. The Comptroller also received letters from a wide array of parents, teachers and community members and staff fielded calls to the Comptroller's toll-free hotline. After receiving preliminary reports from the review team, the Comptroller held a town meeting to hear comments from the public and concerned parents first hand.

Three hundred and thirty-six administrators and support staff; 100 principals and assistant principals; 379 teachers; 104 parents; and 604 community residents completed surveys as part of the review.

The team sent written surveys to district personnel, students and parents.

The review team also consulted two databases of comparative educational information maintained by the Texas Education Agency (TEA)—the Academic Excellence Indicator System (AEIS) and the Public Education Information Management System (PEIMS). SAISD selected peer districts for comparative purposes based on similarities in size, location, student enrollment and property values. The selected peers were the Austin, Corpus Christi, El Paso, Fort Worth and Ysleta ISDs. TSPR also compared SAISD to district averages in TEA's Region 20 Education Service Center, to which SAISD belongs, and the state as a whole.

SAISD served 57,339 students during 2000-01, a 6.17 percent decrease from the 1997-98 enrollment level of 61,112. SAISD has eight high

schools, 17 middle schools, 64 elementary schools and five special campuses for a total of 94 campuses.

SAISD's property value of \$106,000 per student is 46 percent lower than the state average of \$190,000 per student.

More than 85 percent of SAISD's students are Hispanic, 10 percent are African-American, 4.2 percent are Anglo and less than 1 percent are classified as Other. Ninety-three percent of SAISD's students were classified economically disadvantaged in 2000-01.

SAISD has improved its student performance in the last few years. In 1994-95, SAISD had 13 "low-performing" schools, as measured by the TEA's criteria, and had been warned about accreditation problems. In 1999-2000, SAISD was rated Academically Acceptable and had four Exemplary schools and 19 Recognized schools; only three schools were rated Low Performing.

Still, SAISD's student performance remains below the state average. In 1999-2000, 65.6 percent of SAISD students passed the Texas Assessment of Academic Skills (TAAS) test compared to 79.9 percent statewide.

For 2000-01, the district employs 7,501 employees, with teachers accounting for 3,563 or 47.5 percent, of SAISD staffing. The district has budgeted expenditures of \$311,043,230 for 2000-01. Approximately 32.83 percent of SAISD's revenues are generated locally, 65.83 percent come from the state, and less than 1.34 percent come from the federal government.

SAISD's Approach Since the Review

At the time TSPR began the SAISD review, the district was without a permanent superintendent, was experiencing a governance crisis and had significant financial and academic challenges. Dr. Rubén Olivárez was hired as superintendent and came to the district shortly before TSPR's report was released in March 2000. The new administration embraced the review and used it as a guide for comprehensive planning and restructuring.

In an interview with Dr. Olivarez, he said five key areas of the review were used continuously over the last year by the board and by his administration as a reference point. Those areas included:

Governance — the board and administration were determined to develop a better working structure. Following the Comptroller's recommendations, they sought to find ways for the administration and the board to work together, for meetings to be shorter and more productive and to restore the community's confidence in the district.

Financial Management — the district restructured the budget process, enforced policies and procedures including staffing allocations and restored a dwindling fund balance to optimum levels in just over one year.

Academic Programs — acknowledging improvements of the past, the board and administration sought to sustain and accelerate the process. The approach has been a gradual, yet deliberate, reorganization aimed at making the central office more service oriented for campuses and improving the overall quality of services provided to students, all with an eye toward cutting costs to match a declining student enrollment.

Bond Program — insuring the integrity and management of the construction programs is a high priority. The board carefully examined and reaffirmed the role of the Citizen Oversight Committee and its own internal management structure. On May 5, 2001, the voters approved the passage of a \$126.5 million bond construction program. The district first began exploring the possibility of another bond issue during the development of Vision 2005 when a variety of needs emerged, including the need for renovated or new facilities for early childhood, state-of-the-art music facilities at all eight high schools, special education classrooms and an advanced academic center in partnership with the University of Texas at San Antonio (UTSA) downtown. The district will seek federal funds to assist in paying up to 60 percent of the bond debt. The sale of the bonds is contingent on the availability of federal funding assistance. The district's contract with the voters is that SAISD taxpayers will not experience a tax increase with the sale of the bonds.

Planning — the board and administration recognized a need for a comprehensive strategic plan to guide the district into the future. On December 11, 2000, the Board of Trustees unanimously approved *SAISD Vision 2005 - Destination: Exemplary*, the district's five-year improvement plan. The plan is designed to guide the SAISD on its journey to Exemplary by the year 2005. Work on Vision 2005 first began in early spring 2000 as stakeholders representing employees, parents, community leaders and other patrons, along with religious and business leaders, met to provide their ideas on how the district can reach Exemplary status. Vision 2005 also includes the district's new mission statement and is designed to serve as a guidebook for every board and administrative decision. It is organized around the district's nine basic functions: governance, academics, student

support, administration, human resources, communications, school-community relations, facilities improvement and technology.

In all, a little more than one year later, SAISD is a far different district than the one the Comptroller found during the review. And, while the district still has a lot of work to do, both SAISD staff and board members have a sense of steady progress. Seventy-nine recommendations have been implemented, 66 are in various stages of progress and five have not been addressed. SAISD officials rejected four recommendations because they believed implementation was not feasible at this time. (See Appendix A for details on the recommendations' status.)

Chapter	Total	Complete	In Progress	Not Implemented	Rejected	Percent Complete/ In Progress	Grades
District Organization and Management	22	16	6	0	0	73%/27%	Satisfactory
Educational Service Delivery and Performance Measures	25	12	13	0	0	48%/52%	Satisfactory
Community Involvement	6	5	1	0	0	83%/17%	Excellent
Personnel Management	10	3	6	0	1	30%/60%	Satisfactory
Facilities Use and Management	14	8	5	1	0	57%/36%	Satisfactory
Asset and Risk Management	8	2	4	2	0	25%/50%	Needs Work
Financial Management	13	9	4	0	0	69%/31%	Satisfactory
Purchasing and Contract Management	8	1	7	0	0	13%/88%	Satisfactory
Management Information Systems	9	7	1	1	0	78%/11%	Satisfactory
Transportation	13	3	8	1	1	23%/62%	Satisfactory

Food Services	9	2	6	0	1	22%/67%	Satisfactory
Safety and Security	17	11	5	0	1	65%/29%	Satisfactory
Overall Grade	154	79	66	5	4	51%/43%	=94%
Excellent = More than 80% complete Satisfactory = 80% to 100% complete or in progress Needs Work = Less than 80% complete or in progress							

Exemplary Programs and Practices

TSPR identified numerous "best practices" in SAISD. Through commendations in each chapter, the report highlights model programs, operations and services provided by SAISD administrators, teachers and staff members. Other school districts throughout Texas are encouraged to examine the exemplary programs and services to see if they could be adapted to meet local needs. The TSPR commendations include:

- SAISD posts all board meeting agendas and supporting materials on its Web site. Web browsers can download not only the agenda, but also many supporting documents as well. No other Texas school district reviewed by TSPR to date has disseminated this level of detail to the public in this manner.

Since the review, TSPR has regularly pointed to SAISD's Web site as a model site for other school districts, both large and small.

- SAISD collaborates with two area universities, Trinity University and University of Incarnate Word, in programs designed to help principals and teachers attain advanced degrees.

SAISD has fostered partnerships with colleges and universities throughout the county. St. Philips College, San Antonio Community College and Palo Alto College work in high schools offering dual credit opportunities to students. St. Mary's University offers a Reading Specialist Program for a cohort of SAISD teachers. UTSA is developing a reading specialist program as well as a program for Master Reading Teachers. UTSA works with the Advanced Academics and GT Department evaluating grants and offering Advanced Placement training for staff, and with Early Childhood Department's endeavors to offer ongoing professional development to Pre-K and Kindergarten teachers. Texas Lutheran

University and Our Lady of the Lake University also offer teachers Pre-AP and AP training.

- UTSA is involved in an initiative with SAISD that is in its developmental stages but poses a great opportunity for our students to make a seamless transition to a four year University. The effort involves a strong university/district partnership to offer our high school students specialized classes in a student's specified area of interest while staying enrolled at their home campus.

During the summer, SAISD provides migrant students with at-home weekly instruction by qualified teachers supported with distance learning technology. This program serves as an alternative to traditional summer school.

SAISD's summer and distance learning programs for migrant students continue to provide alternative educational opportunities for students that might otherwise be lost to the system. Other migrant program initiatives have been added to further enhance the program such as: tutorials during the school year for secondary students needing assistance to pass their classes, additional assistance in completing college applications for high school seniors wishing to go to colleges and creation of Career and College Awareness Days to highlight opportunities after high school graduation.

- SAISD effectively uses intervention teams to aid its lowest performing schools. These teams make frequent school visits and assist with the implementation of best practices to improve performance.

Through the use of the three-area approach recommended by TSPR, SAISD's central office is adopting a service orientation for campuses that makes the services and resources more accessible to the campuses.

- SAISD attracts many business and community volunteers through an effective system of letters, phone calls and personal visits. The volunteer mentor program, made up of dozens of business partners, uses more than 3,000 volunteers to mentor children from throughout the district.

Dr. Olivárez has emphasized community and business involvement and community involvement by making it one of the nine key areas addressed in Vision 2005. The plan and the implementation of that plan hold significant promise for educational excellence in the district.

- Employees use SAISD's "Intranet," the district's internal Web site, extensively. The site is very well organized and contains useful day-to-day information concerning district policies and procedures.

The district's Intranet continues to be a vital source of communication within the district. The administrative procedures are now completely accessible on-line through the district Intranet. The SAISD administration has developed a comprehensive administrative procedures manual with clear links to board policy. The manual and all of the corresponding forms can be viewed and printed by all staff members, and the search engine makes all procedures more usable as a resource tool.

- SAISD was one of the first districts in the state to operate school-based clinics using health care resources from the area as well as district staff. These clinics provide immunizations and primary health care to students and families. Parents expressed overwhelming satisfaction with students' access to health care.

The six school-based clinics in the district are located at Brewer, Hillcrest, Smith, Nelson, Hawthorne and Bowden elementary schools. For the 2000-01 school year, SAISD nurse practitioners served a total of 451 students (combination of Medicaid physicals and acute care visits). For the same period, the El Centro Del Barrio Clinic located on the Lanier campus recorded 950 medical and 390 dental visits.

- SAISD used a systematic method to assess facility needs when it developed its bond proposal. The level of detail employed allowed the district to provide complete information to SAISD voters and was a major factor in the success of the bond campaign.

The district bond program is progressing on target. A combination of the original detailed assessment and priorities, communication to the schools and public, value engineering and conservative management continues to result in a positive outlook. A current financial assessment shows the availability of \$77 million after all major projects and priorities are completed. A similar process of needs re-assessment is being implemented to identify projects to match these funds.

- SAISD uses a unique process for selecting architects. The district selects eight lead architects to form a design team for each project, resulting in a wide variety of expertise.

This selection process continues to work well for the district. The Team Leader Concept has proved to successfully combine

standard professional design services with team leader project management expertise resulting in project completion that is more economical than using third party program management companies. Most recently, a presentation on the Team Leader Concept to the Council of Educational Facilities Planners International (CEFPI) was well received by other school districts, architects and engineers. SAISD has been able to satisfy its obligation to involve historically under-utilized companies without sacrificing the quality of its projects at a cost saving to the taxpayers.

- SAISD manages student activity funds centrally and maximizes interest yields, by investing cash in interest-bearing accounts. The interest earned is funneled back to the individual schools and programs.

While activity funds are always a challenge to control, SAISD finds that the centralized approach to managing these funds continues to work well. Stronger control is in place over the schools' purchases from student activity funds and the practice of deficit spending has significantly decreased.

- SAISD analyzes the total cost of ownership to determine whether the district should lease rather than purchase computers. The district has saved millions of dollars over the last three years through this strategy.

Technology remains a high priority for the district. As such, the district has developed a schedule by which all schools are being cabled with either bond money or with federal e-rate funds by 2003.

- SAISD's police force receives rigorous training that far exceeds state requirements and contributes to an effective and responsive force.

Training for the police force remains a high priority. From January 2000 until April 2001, various officers have attended 18 new training programs designed to increase their effectiveness when dealing with a school crisis and threats to student safety as well as overall leadership development of officers.

- SAISD's police force continues to increase the value of its technology. The following projects are either completed or in progress: 1) enhanced telephone system with caller ID; 2) property room management with bar code labels; 3) department inventory management with bar code labels and software; 4) automatic

warrant and affidavit preparation; 5) investigative case management with solvability calculations; and 6) restraining order tracking and alerts.

The police force continues to work with the City of San Antonio on one technology-related area of police force operations in need of improvement, the communications system. If a grant can be obtained for a collaborative effort, SAISD could upgrade its communication system to ensure full coverage of all district locations.

TSPR Key Recommendations

The following are some of the key recommendations that administrators and staff said they believe had the greatest impact on district operations. The highlighted recommendations are organized by chapter and by the area of operation as contained in the original report. The comments came from district administrators during the TSPR team's follow-up visit to the district.

District Organization and Management

- #14 **Build three "vertical teams" to provide an infrastructure of support for the district's schools.** According to the superintendent, the central office formerly used a shotgun approach, trying to serve everyone in the district at once. Now, individuals are assigned to and accountable for assisting one part of the district in the areas of personnel, maintenance and operations, custodial operations and food service.
- #21 **Improve the student enrollment projection process in SAISD and link enrollment planning with strategic planning initiatives.** The administration instituted, for the first time, a staffing leveling process whereby actual enrollment is analyzed in October and staffing is adjusted to match the number of students in attendance. In previous years, excess staff were retained, resulting in overstaffing and inefficiencies in many areas of the district. Adhering to staffing allocation formulas (Recommendation #88) and monitoring actual versus projected enrollment resulted in \$7.1 million in staffing reductions during this last school year.

Educational Service Delivery and Performance Measures

- #29 **Establish specific criteria for selecting, implementing, monitoring and evaluating all new educational programs.** The district pointed out that

many of the recommendations in the Education Service Delivery section of the report have fed directly into the Vision 2005 planning process. This particular recommendation for establishing a program evaluation process provided a focus that is a thread throughout the Vision 2005 plan. Each core curriculum department is required to conduct a needs assessment including a review of curriculum programs and past initiatives. Department action plans are designed to meet the goals set in Vision 2005. Strategies and initiatives must be researched-based, have timelines for implementation and include formative and summative evaluations. A district wide plan that includes criteria for program selection, review and continuation will be presented to the superintendent's executive team in the fall of 2001 for approval.

Community Involvement

#50 Develop a community involvement plan in conjunction with existing business and civic partners. Restoring the community's confidence in the district is a top priority of the superintendent; consequently, this recommendation and the planning that went into the community involvement section of Vision 2005 were of particular importance to him. Some of the mentoring programs in the district have been recognized for their excellence at the National Mentoring Conference in Washington, D. C. and by the local newspaper. SAISD will be a presenter at the 27th Annual Governor's Volunteer Leadership Conference in October. The strategies used to increase mentoring programs will also be used to recruit community, business and college partnerships.

Personnel Management

#59 Implement quality control measures in the Human Resources Department.

#60 Create a summary screen of employees' historical personnel data and eliminate the use of the district's service record card. Establishing this new automated system will have significant impacts on the way SAISD does business. The district believes that not only will quality control be improved, but that customer service and overall departmental efficiency will be enhanced.

#61 Develop a formal recruitment plan with written procedures and an evaluation component. Moving toward a customer service orientation and organizing into the three area teams is something the district believes is critical. Recruiting to the needs of the areas and evaluating the effectiveness of those efforts will ensure that the services are being provided in a way that meets the end-users' needs and holds central office employees accountable to the campuses they serve.

Facilities Use and Management

- #70 **Eliminate two drafting positions.** The district needed drafting positions for the new bond program. This recommendation highlighted the fact that these positions existed in another area and were no longer needed there. Consequently, shifting the positions to Construction Management, and paying for the position with bond proceeds, helped the district in several ways.
- #75 **Develop and implement a site-based energy management program.** Energy costs are skyrocketing and although SAISD has implemented a number of districtwide initiatives that are saving the district money, they have not engaged campus-level groups in the process. The district anticipates that working with the Comptroller's State Energy Conservation Office could potentially save the district even more money and teach children and staff valuable energy conservation techniques.

Asset and Risk Management

- #82 Hold principals accountable for ensuring that identification tags are applied to assets placed in their schools. Fixed asset management was a hot topic for SAISD over the last year and accountability is the key. By holding campus-level administrators accountable for the assets they have under their control, the district is ensuring that the resources entrusted to the district by its taxpayers are protected.

Financial Management

- #88 **Review all instructional budget allocation formulas annually.** SAISD has been financially challenged over the last few years due to declining enrollment. When attempting to streamline the budget to address these issues, the district was forced to take a careful look at these allocation formulas and found a lack of adherence to them. In past years, the district had not leveled staff once actual enrollment numbers were known. Consequently, the district was hiring and paying for staff that was not needed based upon current enrollment figures. By applying its own allocation formulas in 2000-01, the district shifted some individuals from campus to campus and eliminated 142 positions, including instructional guides, administrative assistants, counselors, teachers and visiting teachers. This critical step saved the district more than \$7 million, and has been a stepping-stone to improved public confidence in the district's management.
- #90 **Develop a five-year revenue model to manage the cash flow so that the district's fund balance will be increased to the minimum level recommended by the Texas Education Agency.** At the time of the review, SAISD's fund balance was dangerously low. According to financial records, the district's fund balance was \$24 million below the optimum level recommended by TEA. As of August 2000, the district had increased the fund balance by \$10 million, up to \$42.5 million. Projections show the August 2001 fund balance will rise to \$58.8 million or approximately \$2 million

above the optimum, thereby restoring financial stability to the district.

Purchasing and Contract Management

- #100 **Issue procurement cards for staff purchases from local vendors. The district is in the process of implementing Bank of America's purchasing card.** When all of the obstacles are overcome, the district will be able to eliminate emergency checks at the campus level, paperwork will be reduced and controls over purchasing will be improved through built-in limits on cards. Further, the district believes the cards will also save money on travel expenditures since travel can then be booked over the Internet at discounted rates.

Management Information Systems

- #107 **Develop a set of formal, written performance measures to monitor the effectiveness and efficiency of services provided by the Technology Department.**
- #115 **Stagger the hotline's hours of operation between 7:00 a.m. to 5:00 p.m. to allow for more coverage to receive customer calls.** The resounding message being heard from all district administrators during the follow-up review process was "customer service." These recommendations and several others in the technology area were pointed to as key because they have helped the department focus on customer service, measuring customer satisfaction and responding to customers' needs.

Transportation

- #117 Purchase a two-bay maintenance facility.
- #118 Hire two mechanics and one mechanic/ apprentice.
- #128 Outsource the maintenance of district police vehicles. In trying to address some pressing vehicle maintenance needs within very tight budgetary constraints, SAISD discovered that solutions to problems are often right on your doorstep. Lanier High School has a vehicle maintenance program with 23 bays and students who work during the day and in the evening who are capable of performing the kind of maintenance needed by the district. By negotiating an internal agreement, not only will the district benefit, but students will be given real life, hands-on experience and will make extra money as well. Everybody is a winner.

Food Services

- #130 Develop and implement strategies to increase breakfast participation in all middle and high school. While this recommendation is still in progress,

district administrators said that in analyzing this recommendation they were forced to focus on the level of participation at each campus and for each meal, and found there was a need for improvement. The district understands the role of good nutrition in all areas of the educational process, including student performance, discipline management and attendance. Through greater focus, lunch participation is improving, but the district acknowledges that work is needed in the breakfast programs.

Safety and Security

#138 Require each school to complete a security threat assessment of its campus and enforce better physical security measures. Safety has been a big issue for the district in the last year, and administrators told the review team that this recommendation helped them to focus on the issues and helped principals to become more aware of the threats that existed on their campuses. As a result, exterior doors and alarms have been checked and are secure. Additional motion sensors are scheduled to be installed. High school and middle school vault doors have been re-keyed. A summer safe storage procedure has been implemented in all schools. Overall, procedures have improved.

What Still Needs to be Done?

SAISD has made steady progress in implementing TSPR recommendations, particularly considering the district hired a new superintendent during this time. Ninety-four percent of the TSPR recommendations either have been implemented or are being implemented at the present time. District administrators have rejected four of the report's recommendations, and have provided their reasons for their delay or inaction on five others. This section addresses the key areas requiring additional attention.

Asset and Risk Management

District administrators said that the board was reluctant to raise the capitalization threshold for fixed assets to \$5,000 because of the recent problems the district has experienced in accounting for fixed assets. The issues of "accounting for" fixed assets and "counting" fixed assets need to be looked at separately. First, TSPR encourages the district to maintain a control inventory of assets that is unrelated to the fixed asset accounting system. A control inventory will list all of the items the board and district feel need to be "tagged, tracked and counted" regardless of the item's dollar value. The control inventory would include those items, such as

computer equipment, that may have a lower dollar value but are prone to theft or loss.

The formal, fixed asset inventory, however, is a different matter. With the coming implementation of new accounting guidelines set forth in GASB 34, the district will have to depreciate all fixed assets and maintain much more detailed records on these items. Raising the capitalization threshold to \$5,000 will significantly reduce the number of items that must be depreciated and accounted for under this burdensome process.

Understanding this significant difference, TSPR encourages the board to act swiftly to raise this threshold, while still maintaining tight controls over the district's assets through a separate control inventory.

Technology

SAISD has made monumental strides in bringing accountability to its fixed asset and financial systems, but there is clearly work that still needs to be done. Of particular concern is the fact that the district's current software through Region 20 is incapable of providing certain functions and services to the district. We encourage the district and Region 20 to work closely together to make the modifications that are needed for SAISD. By serving SAISD's needs, TSPR believes that Region 20 will then be better able to serve the needs of the smaller districts that it serves.

Financial Management

SAISD has tightened its belt in the last year to the point that the integrity of the fund balance has been replenished, financial stability has been restored and public confidence in the district is on the rise. It is critically important, however, that the board and the administration continue to approach the financial situation of the district with the same passion and vigor with which they have addressed the recent crisis. Although some may encourage the district to return to spending and staffing practices of the past, now is not the time to let down its guard. TSPR encourages district officials to remember the lessons learned in the past and to follow through with the plan and direction for the future — a plan that envisions an exemplary district in terms of student performance, an exemplary district in terms of board governance and an exemplary district in terms of financial strength.

SAISD's Ideas for Improving the Texas School Performance Review

The Texas School Performance Review team does not assume that its process for performing school reviews works so well that it cannot be

improved. Therefore, as part of the progress report preparation, TSPR asked San Antonio ISD staff members and administrators what went right and what went wrong—and how the process could be improved.

The feedback TSPR has received from other districts led to improvements in the review process. For example, early reports did not include implementation strategies, and districts told TSPR they needed help in getting started. As a result, the reports now include implementation strategies and timelines to complement the recommendations. Districts have told TSPR these blueprints are invaluable to achieving the desired results. But, it is important for TSPR to be aware of those things that did not work as intended so that the review process can be continually improved.

San Antonio administrators and board members pointed out that the fiscal impact associated with the much-publicized error in the annual salaries of custodians discussed in Recommendation #72 was controversial. This was an issue that the Comptroller did not take lightly, and swift action was taken to not only reduce the amount paid to the private consulting firm for their services but also to improve TSPR's internal procedures so that this would not happen again.

One of the most significant changes in the way TSPR now conducts reviews is that work papers are obtained from the consulting firms at the time that they submit the final drafts to the Comptroller. In the past, TSPR had depended upon the consultant to verify facts and ensure accuracy as part of the contract agreement. By obtaining the work papers in advance of the release of the report, every fact and figure is now verified by TSPR staff against the work papers to ensure that every number is supported and that all calculations are correct. Other changes to TSPR procedures that resulted from this unfortunate incident included the addition of orientation sessions for consulting firms where the importance of work papers and accuracy are emphasized, the strengthening of contract provisions and the institution of more rigorous editing procedures before a TSPR report is released.

Additionally, TSPR now uses tracking sheets during findings meeting with district administrators. These tracking sheets provide written evidence that all findings in the report have been reviewed and corrected where necessary by district staff and administrators before the report is finalized. While this was a very difficult process for TSPR, it has proven to be a growing experience that has strengthened and improved the process for future reviews.

Transmittal Letter

August 15, 2001

The Honorable Rick Perry
The Honorable William R. Ratliff
The Honorable James E. "Pete" Laney
Members of the 77th Legislature
Commissioner James E. Nelson

Fellow Texans:

I am pleased to present this report on the progress of the San Antonio Independent School District (SAISD) in implementing my Texas School Performance Review (TSPR) recommendations.

In March 2000, TSPR released the results of a review of the district's operations. This review offered 154 recommendations to improve operations and save taxpayers nearly \$28.3 million by 2004-2005. Cumulative net savings from all recommendations (savings less recommended investments) would reach more than \$25.1 million by 2004-05. The review also noted a number of SAISD's exemplary programs and model services provided by district administrators, teachers and staff.

After one year, we returned to check on how well the district's leadership put these proposals into practice. Since the review, SAISD has implemented, or is in the process of implementing, 145 of the proposals, or 94 percent. The district has saved nearly \$6.2 million to date and expects savings to reach almost \$34.8 million in the coming years, significantly exceeding TSPR's estimates.

I applaud the board and superintendent for taking these steps, but urge continued diligence to ensure that students, teachers and taxpayers receive the maximum possible benefit from every dollar spent in SAISD. Nothing is more important than education, and our children are our most precious resource.

This report is available on the Internet at
<http://www.window.state.tx.us/tspr/sanantoniopr/>.

Thanks for all that you do for Texas.

Sincerely,

Carole Keeton Rylander

Carole Keeton Rylander
Texas Comptroller

**Appendix A
Status of Recommendations and Savings**

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	EPISD's Projected Five-Year Savings (Costs)	Comments
Chapter 1: District Organization and Management						
1	Reduce the number of regular board meetings to no more than one per month. p.28	Complete	\$0	\$0	\$0	The board restructured its agenda to significantly reduce board meetings to one per month, with special meetings called as needed. Meetings are more focused on governance, budget and Vision 2005 long-range plan initiatives. Implementation was phased in during the 2000-01 school year.
2	Create four standing committees of the SAISD Board of Trustees. p.29	Complete	\$0	\$0	\$0	Three standing committees: Futures, Student Advisory and Board/Citizen Oversight Committee (COC) Bond, and two ad hoc committees to address Legal Review and Jefferson Historic issues were also created. While standing committees can be a source of micromanagement for some boards,

						<p>the structure of these committees compliments the district's process. For example, the Futures Committee is overseeing the Vision 2005 planning process. The Student Advisory Committee meets monthly with student representatives from the eight high schools to provide input to the board. The Board/COC Bond Committee is actively involved in construction, planning and decision-making. Each of these committees conducts activities that relieve pressure on the board as a whole.</p>
3	Provide agenda meeting packets to the board at least five days prior to regular business meetings. p.30	Complete	\$0	\$0	\$0	Effective 3/27/00, board agenda packets are being sent to board members five to six days prior to each scheduled board meeting.
4	Provide comprehensive materials to the board to allow them to prepare adequately for business meetings. p.34	Complete	\$0	\$0	\$0	Effective 3/27/00, the agenda process has been reorganized and more comprehensive materials are being provided. The

						administration has stated that meetings go quicker when board members have more information. And, the new organization of the agenda into organized areas makes the items for discussion clearer to the board and community members. Finally, the board has begun to use a consent agenda for routine items requiring board approval. In all, this new structure is making board meetings shorter and more productive.
5	Amend board policy to require a fiscal impact statement on all proposed budget actions, including the impact of those actions on the fund balance. p.35	In Progress	\$0	\$0	\$0	The district changed its procedures to require all agenda items with fiscal impacts to be reviewed and approved at the Deputy Supt./Associate Supt. level. Effective 4/25/00, additional fiscal notations have been added to board documents. Board policy is currently under review for

						determination of amendments needed.
6	Amend board policy and allow citizens to provide comments to the board as the first item on the agenda for each board meeting, prior to executive session. p.36	In Progress	\$0	\$0	\$0	Effective 2/14/00, executive sessions have been moved to the end of the board agenda and citizens' presentations to the beginning of the agenda. Board policy is currently under review for determination of amendments needed.
7	Rotate board meetings among schools. p.37	Complete	\$0	\$0	\$0	Meetings are now being held in the community when the focus of the meeting makes the location appropriate. For example, when the board honored Fox Tech, the board meeting was held at that location. Three meetings were held in the schools this year.
8	Provide team building training to board members to promote cooperation and trust, and increase individual training opportunities related to the roles and responsibilities of board members. p.39	Complete	\$0	\$0	\$0	A Governance Effectiveness Work session was held on 2/9/00. Long Range Plan work sessions were held on 4/17/00 and 5/1/00. Additional work sessions are scheduled consistent with Vision 2005 initiatives.

9	Develop operating procedures for the board and a self-monitoring system to ensure that all board members fulfill their roles and responsibilities. p.41	In Progress	\$0	\$0	\$0	Vision 2005 contains a goal and strategies for SAISD's board to become an exemplary school board. In the future, the board will use these strategies as a measure of progress and a self-monitoring mechanism.
10	Reduce the number of hard copies of the policy manual. p.43	In Progress	\$21,000	\$17	\$2,370	Original TSPR cost savings projections were based upon inaccurate costs per page, which were much higher than actual costs for printing and distribution by the Publications Dept. Partially The number of copies sent to schools has been reduced by 100 copies. Further savings can be realized as soon as administrative reorganization has been completed and when the number of administrators receiving the hard copies can also be significantly reduced. In addition, as soon as all policies are brought on-line, further reductions

						of hard copies can be made (only two policies currently do not match and these are being reviewed).
11	Require the superintendent to approve each new or revised administrative procedure prior to the distribution and implementation. p.44	Complete	\$0	\$0	\$0	The deputy superintendent for Human Resources and Academic Support now oversees the coordination of this program, which includes input from the districtwide committee, employee organizations and Principal's Advisory Committee. The organizational structure will be modified to redirect a position to the Governmental Relations Department to oversee the development of policy and procedures.
12	Place the administrative procedures manual on line. p.45	Complete	\$16,800	\$280	\$5,000	Schools now receive only one copy of the policy manual. SAISD previously sent five copies to high schools, three to middle schools and two to elementary schools. The district expects the

						number of hard copies to be further reduced this summer. The savings were somewhat less than anticipated since the district's internal cost for reproduction was less than estimated.
13	Amend board policy BBFA to require board members with substantial interests in businesses to file timely affidavits and officially record conflict-of-interest votes. p.47	Complete	\$0	\$0	\$0	Board members are required to sign and submit conflict-of-interest affidavits during the annual financial audit. During board meetings, each member abstains from votes when there is a conflict-of-interest issue.
14	Build three "vertical teams" to provide an infrastructure of support for the district's schools. p.51	Complete	\$521,940	\$0	\$520,000	In order to provide leadership, guidance and motivation directly to campuses, the district will be divided by high school feeder pattern beginning with the 2001-02 school year. To begin the process of creating three vertical teams, the four steward positions were eliminated and three area director positions were created with lower salaries. The

						creation of area teams is underway and the transition is expected to save nearly \$150,000 per year while providing cross-department team support and service to schools to ensure increased student achievement.
15	Require SAISD central administrators to spend at least one hour per week in direct service support to schools. p.54	In Progress	\$0	\$0	\$0	A Principals' Summit was held with school principals and central office staff to strengthen the common understandings of service delivery procedures and the needs of the campuses. The curriculum support staff has been assigned to provide support to campuses designated as priority schools, monitor program implementation and provide other services as requested. For the 2001-02 school year, the superintendent will assign central administrative professional staff to work with one school on an ongoing basis.

16	Develop specific guidelines to ensure consistency in school management and leadership. p.57	Complete	\$0	\$0	\$0	<p>The communication structure in the district has been modified to ensure effective management of the schools and district. This involves the restructuring of the Campus Leadership Teams, the establishment of the Area Leadership Teams and the establishment of the District Leadership Team. Additionally, the roles and responsibilities of the Campus Instructional Coordinators have been redefined to strengthen the link between C&I and the campuses. Principals' meetings are convened twice a month, the first and third Wednesday of each month at 2:00 p.m. Human Resources staff and Area Superintendents revised the performance responsibilities for the new position of "Area Director for</p>
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						Campus Operations."
17	Increase the authority and responsibility granted principals in managing their own schools. p.58	Complete	\$0	\$0	\$0	<p>The accountability system has been decentralized to provide annual report cards by organizational units within schools (e.g. grade levels, departments and schools within schools). The principal's evaluation instrument has been redefined to provide more emphasis on campus performance results.</p> <p>Systemwide staff development has been restructured to allow school personnel at each campus the opportunity to plan and implement approximately 80 percent of the overall staff development initiatives based on choice and campus needs. The reconstitution of central office personnel as service teams by areas has solidified the focus at the campus level.</p> <p>Other financial and budgetary</p>

						responsibilities, such as fixed assets and textbook accountability, have been redefined in policy to give principals more autonomy, flexibility and accountability.
18	Decentralize the budget process and train district employees in budget functions. p.60	Complete	(\$6,000)	\$0	\$0	The budget development process has been restructured to ensure that each cost center, including campuses, is responsible for developing its own annual budget. Budget retreats have been carried out for training and reviews.
19	Evaluate the need for maintaining four principals at Jefferson HS. p.62	Complete	\$0	\$57,600	\$288,000	For 2000-01, Jefferson has only one principal and three assistant-principals, following a more traditional approach. Savings have been realized by the reassignment of personnel.
20	Establish a strategic planning process in SAISD. p.66	Complete	\$0	\$0	\$0	The board and administration recognized a need for a comprehensive strategic plan to guide the district into the future. On December 11,

						<p>2000, the Board of Trustees unanimously approved SAISD Vision 2005 - Destination: Exemplary, the district's five-year improvement plan. The plan is designed to guide the SAISD on its journey to exemplary status by the year 2005. Work on Vision 2005 first began early spring 2000 as stakeholders representing employees, parents, community leaders and other patrons, along with religious and business leaders, met to provide their ideas on how the district can reach exemplary status. Vision 2005 also includes the district's new mission statement and is designed to serve as a guidebook for every school board and administrative decision. It is organized around the district's nine basic functions: governance, academics, student</p>
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						support, administration, human resources, communications, school-community relations, facilities improvement and technology.
21	Improve the student enrollment projection process in SAISD and link enrollment planning with strategic planning initiatives. p.67	Complete	\$0	\$0	\$0	The systemic process for budget development includes the establishment of databases for more accurate forecasting of student projections during the budget planning process. Further, and more importantly, the administration instituted for the first time a staffing leveling process whereby actual enrollment is analyzed in October and staffing is adjusted to match the number of students in attendance. In previous years, excess staff was retained, resulting in overstaffing and inefficiencies in many areas of the district. Adhering to staffing allocation formulas and monitoring actual versus projected enrollment resulted

						in \$7.1 million in staffing reductions during this last school year. Savings are recognized in Recommendation #88.
22	Hire an in-house attorney. p.70	In Progress	\$755,000	\$0	\$0	Internal mechanisms have been put in place to hold the line on costs. Consequently, legal fees are going down. This year the fees were under \$600,000. An ad hoc committee of the board is reviewing this recommendation and is examining several alternatives, including the use of an in-house attorney to act as a gatekeeper to assign and monitor the work of external attorneys.
Total - Chapter 1			\$1,308,740	\$57,897	\$815,370	
Chapter 2: Educational Service Delivery and Performance Measures						
23	Reclassify curriculum specialist positions to eliminate inequities in assignment and overspecialization. p.83	Complete	\$0	\$0	(\$300,000)	The reorganization has been completed. Additionally, a comprehensive study to align salaries and responsibilities has been commissioned. Recommendations,

						including salary increases to eliminate inequities estimated to be about \$75,000 annually for the next four years, will be taken to the Board of Trustees in June 2001.
24	Reduce the number of educational aides and professional support positions and use the savings to increase the number of classroom teachers. p.84	Complete	\$0	\$0	\$0	The intent of this recommendation was to have SAISD examine its instructional staffing patterns to insure that all classrooms were served by appropriate teaching staff. The district eliminated some instructional assistant positions through attrition for the 2000-01 school year. Applying its own allocation formulas, however, showed that the district was also overstaffed with teachers, and those positions were also eliminated. In a separate action, the district created a new early childhood program and used a \$3 million grant to hire additional aides for each of the elementary

						schools to support that initiative. This resulted in a net increase, rather than decrease, in aide positions districtwide. At the end of the 1998-99 school year, the district had 834 instructional assistant units; whereas, at the end of the 1999-2000 school year, there were 781. Savings from the initial staffing reductions and reallocations districtwide are recognized in Recommendation #88.
25	Allow schools to choose the number of instructional guides they wish to employ and hold the instructional guides accountable for their curriculum improvement. p.87	Complete	\$0	\$0	\$0	Each campus is assigned at least one Campus Instructional Coordinator (CIC). At its discretion, a campus is allowed to increase the number of CICs. In an effort to support high-need campuses designated as Low-Performing and Priority Campuses, central administration has assigned more than one CIC to those campuses. During the budget development process, the

						principal and Instructional Leadership Team (ILT) determine the need for the appropriate number of CICs for their campus. Campuses are given the freedom to convert resources for CICs to other positions or programs as they deem necessary and a variety of funding sources may be accessed.
26	Update the fine arts curriculum guide and create a master schedule for updating all curriculum guides. p.91	In Progress	(\$4,360)	\$0	(\$5,000)	A Fine Arts Team met to complete standards for Instrumental Music, Vocal Music, Music History, Elementary Music, Theater Arts and Visual Arts. The scope and sequence is currently being written for Instrumental Music, Vocal Music, Elementary Music and Visual Arts. A master schedule for updating all standards, scope and sequence has been developed with the first revisions to be completed this

						summer. Because this was done as part of a larger initiative, the cost attributed to Fine Arts is loosely estimated by the district as \$5,000.
27	Increase the district's use of technical assistance and resources provided by local universities, community colleges and the Region 20 Education Service Center. p.93	In Progress	\$72,004	\$0	\$0	A number of collaboratives have been developed with local universities, colleges and Region 20. The following are some examples: The University of Texas at Austin provides technical assistance for the Student Voices Project. The University of Texas at San Antonio (UTSA) and San Antonio College provide professional development for the Bilingual and Early Childhood Education Programs. The UTSA has a major partnership with SAISD for the Advanced Academic Services Academy. Region 20 Service Center also provides professional development in the High/Scope Approach and

						<p>Aspiring Leaders Program.</p> <p>Superintendent Olivárez met with the Region 20 executive director to discuss technical assistance available from Region 20. SAISD has been the lead school district in the San Antonio Urban Systemic Initiative (USI), a partnership of ten school districts and surrounding universities. The collaborative has applied for another grant from the National Science Foundation for an additional three years to continue to provide technical assistance and resources in the areas of mathematics, science and technology.</p>
28	<p>Provide sample lesson plans for teachers for each grade level and hold teachers and principals accountable for following the district's lesson plan procedures. p.95</p>	In Progress	\$0	\$0	\$0	<p>The district lesson planning guidelines, as outlined in administrative procedures, have been reviewed. Campus leadership teams will be provided with an outline of planning requirements and</p>

						strategies for helping teachers use the district standards to plan daily lessons. Additionally, a number of curriculum management systems (Marco Polo, Light Span, SATEC) have been reviewed to provide teachers the opportunity to utilize exemplary, interdisciplinary lesson plans.
29	Establish specific criteria for selecting, implementing, monitoring and evaluating all new educational programs. p.101	In Progress	\$0	\$0	\$0	Each core curriculum department is required to conduct a needs assessment, including a review of curriculum programs and past initiatives. Department action plans are designed to meet the goals set in Vision 2005. Strategies and initiatives must be researched-based, have timelines for implementation, and include formative and summative evaluations. Campuses also follow this procedure when developing strategies and/or

						selecting programs to address student needs. A districtwide plan that includes criteria for program selection, review and continuation will be presented to the superintendent's Executive Team in the fall of 2001 for approval.
30	Provide training to teachers in the interrelationships among TEKS,TAAS, national and local standards, curriculum guides, school reform initiatives, student assessment, and data analysis. p.103	Complete	\$0	\$0	\$0	With the development of the district standards at each level, professional development has been provided on the relationships among the standards, TEKS, TAAS and national standards. During the 2000-01 school year, district training, using the trainer-of-trainer model with campus instructional coordinators, has focused on implementing the District Standards. For 2001-02, specific professional development modules based on the Role of the Teacher Matrix will address the District Standards,

						TEKS, best practices, student assessment and data analysis.
31	Develop and adopt standards establishing minimum instructional time for core subject areas. p.104	In Progress	\$0	\$0	\$0	Teaching time frames have been developed with recommendations for time allocations for each of the core disciplines. The district scope and sequence provide guidelines for time needed to teach performance standards for students to meet expectations. Campuses have been given the discretion to plan schedules to meet the needs of the students on their respective campuses. During 2001-02, district cross-disciplinary service teams will have an opportunity to collect classroom observations, monitor scope and sequence and review interim assessments. This information can then be used to make recommendations to the superintendent for administrative procedures for

						minimum time requirements for core courses.
32	Develop more agreements between district high schools and community colleges and encourage students' participation in dual-enrollment, credit-earning programs. p.107	In Progress	\$0	\$0	\$0	Each high school campus is exploring options to increase the number of dual credit offerings. The district recognizes that substantial savings of college tuition dollars are available to students that participate in such courses. SAISD is exploring options for non-AP students to participate. Currently, they have several such courses available in Career and Technology. The Alamo Community College District now has on-line dual credit courses. Through Vision 2005, a partnership with UTSA will allow students to receive college credit while attending the Advanced Academic Services Academy.
33	Eliminate career or technical programs with fewer than six students. p.108	Complete	\$2,449,387	\$0	\$0	The Career and Technology director reviewed campus programs and made

						<p>recommendations for position cuts in the Spring of 2000. Fifteen positions were eliminated through attrition throughout the course of the 2000-01 school year. Guidelines for class size per subject area were developed and are being implemented. Savings are shown as part of overall savings in Recommendation #88.</p>
34	<p>Initiate a district career day and promote the participation of all schools. p.109</p>	Complete	\$0	\$0	\$0	<p>A districtwide committee met and developed a plan to educate parents and students about the "Recommended Graduation Certificate." Strategies are being implemented to promote career awareness on each campus. The Texas Scholars Program was initiated in early fall 2000 with more than 200 business volunteers conducting the career awareness classes for all eighth graders in SAISD. A brochure</p>

						indicating career and technology paths has been produced by the Career and Technology Education Department.
35	Test all children and use the test results to strengthen the district's curriculum and instruction. p.115	In Progress	\$0	\$0	\$0	Special Education is in the process of program and curriculum restructure. The goal of the department is to integrate its programs into a more general education setting while aligning the curriculum with TEKS and the district's standards with modified or alternative curricula where appropriate. Area superintendents met with principals and are monitoring how principals are dealing with special education. Principals are now required to sit in on Admission, Review and Dismissal (ARD) meetings to ensure that referrals to special education are appropriate and that every student that can be tested is tested. A review of invalid referrals

						is also being done to determine which campuses are having the greatest number of invalid referrals so that adjustments can be made.
36	Develop and implement training for parents of special education students on their rights and responsibilities. p.116	Complete	(\$2,040)	(\$1,014)	(\$5,070)	The Special Education department has developed educational initiatives, which promote parents as partners to become active participants in the education of their children. Within the initiatives are the basic components, which emphasize parent participation: informational systems, training and education, and parent as partners. In addition, a Special Education Advisory Committee, made up of parents from schools in each area, special education teachers, principals and other staff, has been formed to give the special education staff and central administration input on program issues, trends, and

						procedures.
37	Update district procedures related to the reporting of dropout rates and ensure that these procedures are followed. p.118	In Progress	\$0	\$0	\$0	The District Procedures Committee and the Management Information Systems Department are currently reviewing and revising the dropout reporting procedures including data input and quality standards. A step was added to the process where principals received training on how to review and correct errors on the reports. For the 2000-01 school year, eight additional school attendance auditors were allocated to the campuses to visit homes to verify and correct erroneous data. Further, principals identified data entry people that had fallen behind and provided additional support to ensure that all data was entered.
38	Update the SAISD Dropout Prevention Plan and include an oversight provision to ensure that all elements of the plan	In Progress	\$0	\$0	\$0	The mission statement for Vision 2005 is that all students will graduate. One of the major

	are integrated with one another. p.122				components in Vision 2005 is school completion. Major emphasis has been placed on the early childhood education program. Specifically, the Pre-K for three and four year olds has been enhanced to include full day services for more than one-third of the elementary schools. An Early Childhood Task Force meets regularly to discuss curriculum and teacher training. Through the Ninth Grade Initiative, at-risk, over-aged ninth grade students are monitored in a program that focuses on accelerating academic success and school attendance in a small, caring environment that provides on going support and encouragement. The Ninth Grade Initiative Committee (composed of principals, teacher specialists and teachers) oversees the organization
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						and implementation of the Ninth Grade Initiative and Grant. Additionally, the Department of Labor, through the Alamo Work Force Development Board, granted Lanier HS and Fox Tech HS a grant to train and place students in high-paying jobs. Additional revenues as a result of increased attendance are shown in Recommendation #150.
39	Develop a pilot two-way immersion program at two SAISD middle schools. p.124	In Progress	(\$42,000)	\$0	(\$329,000)	Plans to extend the dual language program to one middle school are underway for the 2001-02 school year.
40	Eliminate the practice of removing teachers from their regular instructional responsibilities to assist in the identification of gifted and talented students. p.126	Complete	\$198,895	\$37,859	\$189,295	Currently, 32 teachers conduct the identification of GT students for one day per year at a cost of \$1,920 (32 x \$60). This has eliminated the practice of removing large numbers of teachers from their regular instructional duties.
41	Schedule teachers to	Complete	\$180,000	\$0	\$0	Professional

	attend gifted and talented training during the days designated for professional development. p.127					development sessions for gifted and talented staff development are now being held outside the instructional day. Training is provided on Saturdays, after school or during the summer. There is an increase in cost for the supplemental pay and consultant fees, which equals the amount that would have been spent on hiring substitutes under the old plan. The benefit of this recommendation is that teachers are able to remain in their classrooms.
42	Assess the pattern of student absences for SAISD extracurricular activities and determine whether a greater number of days should be permitted. p.131	Complete	\$0	\$0	\$0	Assessment of student absence patterns was completed. There are no indications of excessive absences occurring. Counselors at the local campuses are monitoring.
43	Coordinate the planning, training, distribution and monitoring of all district-administered tests. p.134	In Progress	\$0	\$0	\$0	The director of Testing and of Research and Evaluation report to the deputy superintendent of Student Support Services and

						counselors work closely with both sections. The district contracted with an outside firm, Gibson Consulting Group, to conduct an organizational study for the management of all student performance and other student information. The superintendent received a preliminary report and is reviewing the recommendations with the executive team. A comprehensive framework for all assessments in the district has been developed as it relates to interim and customized teacher assessments.
44	Develop and use a test-taking strategies guide. p.135	In Progress	(\$1,360)	\$0	\$0	Test-taking strategies are embedded in the scope and sequence for Language Arts/Reading curriculum. Through professional development, administrators, CIC, and in the fall of 2000, teachers

						received a training module called "Narrowing the Instructional Focus In TAAS."
45	Require schools to incorporate a technology section in their campus improvement plans. p.138	Complete	\$0	\$0	\$0	All campus and department improvement plans have technology incorporated in all areas and technology is a major section in Vision 2005.
46	Establish a coordinated plan between the Division of Curriculum and School Support and the Instructional Technology Department to deliver curriculum and instructional services to students. p.139	In Progress	\$0	\$0	\$0	The Curriculum and Instruction (C&I) directors, including an Instructional Technology Specialist, and Special Education, meet on a weekly basis to discuss campus staff development needs, issues that affect the schools, campus administrators and C&I department. Further, there are instructional technologists assigned in the areas of reading, math, science and social studies. The issues and solutions discussed at meetings are then disseminated to the rest of the C&I and Instructional Technology (IT)

						<p>staff for action. The C&I staff provide staff development to elementary, middle and high school CICs using the trainer-of-trainer model to deliver instructional strategies that also address the integration of technology when applicable. The staff also meet with campus department chairs after hours once a month to address core curricular issues. A representative from the Instructional Technology department attends as needed. For 2001-02, professional development modules will address campus needs as reflected in The Role of the Teacher Matrix, including district standards, TEKS, best practices that include technology integration, student assessment and data analysis.</p>
47	Enforce standards and procedures for the transmission of	Complete	\$0	\$0	\$0	SAISD continues to monitor the transmission of

	student health records. p.143					student health records through detailed end-of-the-year procedures and staff development sessions conducted by Management Information System/Student Transcripts. The district is reviewing the possibility in the future of computerizing health records with the ability to transfer them electronically.
Total - Chapter 2			\$2,850,526	\$36,845	(\$449,775)	
Chapter 3: Community Involvement						
48	Develop board-approved guidelines that encourage the active participation of COC members and clearly delineate a process for submitting recommendations to the board. p.154	Complete	\$0	\$0	\$0	In April 2001, SAISD's board formally acknowledged the continuation of the Citizen Oversight Committee (COC) and made a commitment to San Antonio taxpayers that the COC would oversee the work of the newly approved \$124 million bond program. A statement identifying COC participation is included in all bond construction items presented to the Board of

						Trustees for approval. COC recommendations are presented to the superintendent for consideration for placement on the board agenda.
49	Begin a series of community discussions with government bodies, the local workforce development board, higher education institutions and business and community organizations. p.155	Complete	\$0	\$0	\$0	SAISD has formed collaborative partnerships with local universities, the workforce development board and other local area organizations to seek grant funding and offer special programs to our students. Examples of this are the Youth Opportunity Grant Project, the Burbank Cluster Alliance Schools and a SAISD/UTSA partnership school being planned as part of Vision 2005 and the newly approved bond program.
50	Develop a community involvement plan in conjunction with existing business and civic partners. p.157	Complete	\$0	\$0	\$0	Community involvement is a primary area addressed in the Vision 2005 plan. For 2001, SAISD has improved upon its exemplary volunteer mentor program by implementing various recruiting

						<p>strategies. Radio and television public service announcements, television tapings, articles in local business, military, college and community newspapers and newsletters are used to advertise the need for mentors. In addition, contacts and presentations with all chambers of commerce, Lions Clubs, Kiwanis Clubs, Optimist Clubs, religious organizations, various sororities and retiree organizations have been made. Some of the mentoring programs in the district have been recognized for their excellence at the National Mentoring Conference in Washington D.C. and by the local newspaper. SAISD will be a presenter at the 27th Annual Governor's Volunteer Leadership Conference in October. The strategies used to</p>
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						increase mentoring programs will also be used to recruit community, business and college partnerships. These partnerships will meet district needs such as a speaker's bureau, field trips, job shadowing, academic support and career days.
51	Establish regular meetings with the communications staff and the superintendent to facilitate a shared vision. p.159	In Progress	\$0	\$0	\$0	A new Communications Director was hired April 2001. Regular meetings have been established. The department is presently undergoing reorganization and redefinition of roles and responsibilities. Under Vision 2005, a districtwide communications plan will be developed.
52	Create an ombudsman in the superintendent's office. p.164	Complete	(\$252,350)	(\$45,000)	(\$225,000)	While the district has not designated an ombudsman, the executive assistant to the superintendent serves as a primary contact for all incoming complaints or concerns. She directs calls to the

						appropriate people within the district and because of her direct reporting relationship to the superintendent, she is able to ensure that problems are handled in a timely manner. Area campus operations staff are initially responsible for student and parent appeals. The executive assistants for the deputy superintendents also assist with parent concerns appealed at the superintendent's level.
53	Implement quarterly public forums to allow members of the community to speak on issues affecting the school district. p.165	Complete	\$0	\$0	\$0	While no formal policy has been developed, beginning with the development of the Vision 2005 five-year plan, periodic district-level community meetings have been held to both gain input on the development of the plan and to provide information on the details of the final plan. Increased parent and community involvement is an initiative of the plan which

						requires all schools to hold meetings at their campuses at various times during the school year.
Total - Chapter 3			(\$252,350)	(\$45,000)	(\$225,000)	
Chapter 4: Personnel Management						
54	Conduct criminal background checks on only new employees and redistribute the responsibilities of support staff members more evenly. p.174	Rejected	\$0	\$0	\$0	The district believes it is imperative that they have complete and timely access to criminal history information for all viable candidates as this information helps the district determine if a candidate will be considered for employment.
55	Document current procedures used in the Human Resources Department and use this opportunity to reassess internal processes and make adjustments to improve efficiency. p.176	Complete	\$0	\$0	\$0	Specific departmental procedures have been developed to ensure efficiency, consistency of implementation of guidelines and to facilitate communication. Procedures will continue to be developed as needed.
56	Develop an employee handbook for all SAISD employees and update annually. p.177	In Progress	\$0	\$0	\$0	Handbooks already existed for Classified Employees and Substitutes. An individual has been designated to work on handbooks for the remaining categories of

						employees during the summer for dissemination at the beginning of the 2001-02 school year. All handbooks will then be reviewed and updated annually.
57	Develop and update job descriptions for each position in the district, standardize the format, and systematically review and update every three years. p.183	In Progress	\$0	\$0	(\$68,000)	The district is currently updating job descriptions as position vacancy announcements are developed. The Texas Association of School Boards (TASB) is completing its work on a districtwide compensation study, which will be followed by a scheduled plan for the revision of all job descriptions. The district is considering the purchase of software to assist in writing job descriptions.
58	Create and implement a personnel action form for all personnel changes. p.185	Complete	\$0	\$0	\$0	Internal processes have been developed to effectively manage personnel changes, including forms that are used for approval and data entry. The process will be enhanced and changed once the position

						management system is implemented in December 2001.
59	Implement quality control measures in the Human Resources Department. p.186	In Progress	\$0	\$0	\$0	Quality control measures have been implemented, but the district chose not to use the Region 20 solution. Instead, the Finance and Human Resources Departments are coordinating the implementation of a position control management system to be completed by December 2001.
60	Create a summary screen of employees' historical personnel data and eliminate the use of the district's service record card. p.188	In Progress	\$0	\$0	\$0	Quality control measures have been implemented, but will be further enhanced with the new position management system.
61	Develop a formal recruitment plan with written procedures and an evaluation component. p.197	Complete	\$0	\$0	\$0	A formal recruitment plan has been developed that will allow the Human Resources Department to evaluate recruitment efforts on an on-going basis. Additionally, the department is organized to support the three areas of the school district in an effort

						to enhance the level of support provided to the campuses.
62	Consolidate all employee personnel files and establish procedures for their maintenance and security. p.205	In Progress	\$0	\$0	\$0	New procedures have been developed to ensure that personnel files are more readily accessible and to improve security measures. The district is also continuously striving to microfilm records so that they can be filed and stored centrally.
63	Create a system to track employee training and make the system accessible throughout the district. p.208	In Progress	\$0	\$0	\$0	Currently, the responsibility for maintaining documentation related to staff development belongs to the individual campuses and the various departments in Curriculum & Instruction and Special Education. The former technology person was working on an Intranet-based solution that would advertise the staff development offerings and allow attendance to be tracked. Phase one, the posting of staff development on

						the Intranet, is complete, but with the departure of the individual who was working on this, the tracking phase has not been done. Human Resources works jointly with Staff Development to ensure that training related to certification requirements are documented and maintained.
Total - Chapter 4			\$0	\$0	(\$68,000)	
Chapter 5: Facilities Use and Management						
64	Combine the Plant Services and Construction Management Departments. p.215	Complete	\$581,220	\$116,244	\$581,220	The two positions identified to be eliminated have been phased out by attrition during the 2000-01 school year. The two departments will continue to be managed separately until the conclusion of the construction program.
65	Hire an educational facilities planner and develop guidelines for developing educational specifications for each major construction project. p.219	In Progress	(\$316,135)	\$0	(\$251,135)	This position is being proposed for school year 2001-02 and will be paid for completely out of the bond funds. The local budget will not be affected.
66	Establish a policy governing portable classrooms. p.224	Complete	\$0	\$0	\$0	As part of the current bond construction program, the need

						for portable classrooms is being reduced as new permanent classroom additions are occupied. Barring unforeseen future changes in student enrollment patterns, it is expected that the use of portables will be minimal after 2005.
67	Compile and maintain an accurate space inventory for each school using a standardized process. p.225	In Progress	\$0	\$0	\$0	A space inventory for each school has been compiled and is being updated every six months to reflect changes, but it does not contain the level of detail suggested by this recommendation. As part of the new bond project, the district will be hiring a facility planner that will be able to compile more detailed inventories.
68	Conduct a space utilization study of the district's support space. p.226	Not Implemented	(\$40,000)	\$0	(\$40,000)	A study of the district's support facilities is planned when funding becomes available.
69	Assign responsibility for the activities outlined in the communication activities section of the construction management plan,	Complete	\$0	\$0	(\$224,000)	External communication responsibilities have recently been assigned to the Communication Department and

	particularly the measuring of success and the media relations. p.239					will be funded by the bond program. The district is in the process of filling this newly created position that will be housed in Communications.
70	Eliminate two drafting positions. p.241	Complete	\$309,640	\$0	\$0	Because of the upcoming new bond program, these two drafting positions have been reassigned to support the Construction Management Department.
71	Develop a standard design manual for all design teams that emphasizes consistency and standardization. p.242	Complete	\$0	\$0	\$0	Design guidelines are available for use by design teams for consistency and standardization.
72	Establish a best practices ratio for assigning custodial staff. p.249	Complete	\$13,171,275	\$431,403	\$2,157,015	SAISD uses MASBO CO/OP Basic Custodial Formula (MBCF) to determine custodial staffing that also uses other factors as well as building square footage to determine the staffing for custodians. This formula has proven to be a more accurate formula for school district operations. However, in analyzing current

						<p>custodial staffing, 21 positions were eliminated during the 2000-01 school year due to changes in the use of school facilities as a result of school construction projects. The district used a midpoint salary of \$16,000 plus 17 percent benefits to calculate the related savings. This reduction in staffing was accomplished through attrition.</p>
73	<p>Evaluate the change in custodial supervision and review the division of responsibilities among the parties. p.250</p>	Complete	\$0	\$0	\$0	<p>The district evaluated the current procedures and found them to be satisfactory. Newly assigned principals are briefed on the procedures by the custodial supervisor assigned to the respective area. Although custodians are assigned to the principal's staff, area custodial supervisors are available to assist the principal with any issues regarding custodial duties.</p>
74	Develop and	In Progress	\$0	\$0	(\$1,250,000)	The district

	implement a districtwide process for the storage and disposal of hazardous materials used in school science laboratories. p.251					implemented a districtwide safety program and trained all science staff and campus instructional coordinators on the Texas Education Agency (TEA) Manual on Safety Standards K-12 to prevent any future accumulation of hazardous chemicals. In addition, a hazardous chemical inventory of every campus in the district has been conducted and the district is preparing to solicit bids to remove hazardous chemicals from 17 middle schools and eight high schools at a cost of \$50,000 per campus.
75	Develop and implement a site-based energy management program. p.252	In Progress	\$700,000	\$0	\$0	Plant Services has a district-level energy management program that is both conserving energy and allowing SAISD to maximize use of its buildings. All HVAC systems in the district are managed by a central computerized

						management system. Hours of building use are programmed into this computer. The HVAC system is turned on and off by this computer according to pre-set temperatures. A vacant position for Energy Monitor, at a salary lower than recommended, will be filled in the near future. District administrators said they are in the process of contacting the State Energy Conservation Office to assist campuses to create and monitor campus-level energy programs such as WATTEAM and Watt Watchers.
76	Prepare and adopt a land acquisition process that will maintain an inventory of sites for future expansion. p.255	Complete	\$0	\$0	\$0	A process of land acquisition is currently being implemented to meet current and future needs.
77	Develop and implement a process for replacing equipment regularly. p.255	In Progress	\$0	\$0	\$0	As GASB 34 is implemented, the district will begin to depreciate construction equipment and, where possible, to fund that depreciation and

						replace the equipment as funds become available.
Total - Chapter 5			\$14,406,000	\$547,647	\$973,100	
Chapter 6: Asset and Risk Management						
78	Program SAISD's accounting software to calculate a single rate of return for all district investments, regardless of type (for example, money market, U.S. agency bonds) and maturity. p.265	Not Implemented	\$0	\$0	\$0	Region 20's software was capable of producing these reports. The district is, however, using Texpool and TASB's investment services and other resources to compare investment performance.
79	Increase the dollar value at which items are recorded as fixed assets from \$500 to \$5,000 to match TEA's definition of fixed assets. p.269	In Progress	\$0	\$0	\$0	The administration presented this recommendation to the board for consideration, but the board has been reluctant to implement a higher capitalization threshold because of recent media attention given to missing assets. The matter is still being considered.
80	Require principals and school-level staff to conduct physical inventories and the Fixed Assets Department to audit those inventories at all schools annually. p.271	Complete	\$0	\$0	\$0	Beginning in fiscal 2001, all campuses and departments are required to conduct an annual self-evaluation. The first self-evaluation was completed in October 2000. The evaluations conducted at the

						high schools were verified by fixed assets staff. Technology staff verified middle school evaluations. Exit conferences were held with middle school principals to discuss results. High school principals received a written report. Starting in fiscal 2002, the finance area will do random evaluations to verify the accuracy of campus and departmental submissions.
81	Purchase bar code reading equipment. p.272	In Progress	(\$12,950)	\$0	\$0	The district reviewed bar coding software and equipment and found that the current fixed asset system is not compatible with bar coding software and equipment. Region 20 ESC is currently working on programming the system to integrate bar coding systems and to comply with GASB 34 requirements to depreciate assets.
82	Hold principals accountable for	In Progress	\$0	\$0	\$0	The districts current

	ensuring that identification tags are applied to assets placed in their schools. p.273					competitive bid will require vendors to affix identification tags on equipment and install security cables. The annual appraisal instrument will contain accountability benchmarks for fixed assets.
83	Create and implement an early return to work policy and related procedures. p.281	Complete	\$250,550	\$125,000	\$1,250,000	Administrative procedures have been developed and are currently being implemented. Five months of implementation have resulted in \$125,000 in savings. The Bonafide Job Offer Program, whereby the district sends a formal letter to employees offering them a position and agreeing to modifications to accommodate their medical condition, has also contributed toward the savings. The district projects annual savings of approximately \$250,000.
84	Develop and implement a formal accident-prevention program. p.283	In Progress	\$321,620	\$0	\$0	Currently, the staff of the Workers' Compensation Program monitors and takes

						corrective measures regarding accident causes. Periodic staff training is provided.
85	Eliminate one clerk position in the Employee Benefits and Risk Management Office. p.286	Not Implemented	\$124,605	\$0	\$0	This position has been assigned additional duties in connection with the modified return to work program and the individual in the position has been cross-trained to assist in retirement processing. Nevertheless, the workers' compensation duties remain full-time.
Total - Chapter 6			\$683,825	\$125,000	\$1,250,000	
Chapter 7: Financial Management						
86	Clearly define the roles and responsibilities of all positions in the newly restructured Financial Services Department, and eliminate five clerk positions. p.298	Complete	\$671,000	\$116,922	\$602,141	Four clerk positions have been eliminated. This resulted in annual payroll cost savings of approximately \$116,922 and related operational costs of \$17,531. The district is also considering a future reorganization that would bring the controller under the associate superintendent for Finance. The controller would assume all

						accounting-related activities. Budget and Funds Management would continue to report separately.
87	Revise the format of the official budget document to include more relevant information for parents and the community. p.307	Complete	\$0	\$0	\$0	The Vision 2005 and the budget process are integrated. The document reflects the integration of Vision 2005, explains changes in the budget from prior years and contains demographic information for the district. Each of the department's objectives and strategies are reflected in the document. Financial resources will be linked to Vision 2005.
88	Review all instructional budget allocation formulas annually. p.310	Complete	\$0	\$7,146,474	\$35,732,370	Instructional and non-instructional allocation formulas were reviewed and compared against current staffing levels. As a result, in 2000-01, the district shifted some individuals from campus to campus and eliminated 142 positions including instructional guides, administrative assistants,

						<p>counselors, teachers and visiting teachers. This critical step was necessary because of the district's declining enrollment. In past years, the district had not leveled staff once actual enrollment numbers were known. Consequently, the district was hiring and paying for staff that was not needed based upon current enrollment figures. As a result, the district has been able to rebuild its sorely depleted fund balance and restore financial stability to the district.</p>
89	Distribute copies of all budget documents to the public and permit public input at work sessions. p.311	Complete	(\$15,000)	(\$2,500)	(\$12,500)	The current budget process allows the public to provide input. Region 20 ESC and the Finance Office are working to allow public and district staff to obtain budget status reports via the Internet.
90	Develop a five-year revenue model to manage the cash flow so that the district's fund balance will be	Complete	\$0	\$0	\$0	At the time of the review, SAISD's fund balance was dangerously low. According to financial records,

	increased to the minimum level recommended by the Texas Education Agency. p.314					the district's fund balance was \$24 million below the optimum level recommended by TEA. As of August 2000, the district had increased the fund balance by \$10 million, up to \$42.5 million. Projections show the August 2001 fund balance will rise to \$58.8 million or approximately \$2 million above the optimum, thereby restoring financial stability to the district.
91	Monitor both expenditures and enrollments at detailed levels and report monthly to the board on expenditures and enrollment levels. p.316	Complete	\$0	\$0	\$0	The Budget Office monitors monthly expenses and prepares reports for the board. This office now issues a budget status report by the 10th of each month for campuses and internal departments.
92	Increase controls over emergency purchase orders and hold principals and department heads accountable for any purchase that exceeds budgeted amounts. p.317	Complete	\$0	\$0	\$0	The assistant superintendent for Finance began by monitoring all purchases in Spring 2000. He counseled with principals who were not following guidelines. As adherence to procedures

						improved, the Purchasing Department now prepares a report of any deviations and the area superintendents meet with the principals to counsel them. Principals that fail to adhere to procedures are now evaluated on their performance. A report of purchases made outside the guidelines is also provided to the deputy superintendent for Curriculum and Instruction.
93	Develop policies and procedures manuals for all offices in the Financial Services Department and place the manuals on the district's Intranet. p.320	In Progress	\$0	\$0	\$0	The administrative procedures are currently under review. Human Resources is coordinating this review and has placed manuals on the Intranet.
94	Modify district policy so that only checks over \$5,000 must have a personal signature. p.322	Complete	\$0	\$0	\$0	Administrative procedures were changed to require a review and initials for checks \$10,000 or more.
95	Complete the installation of the Kronos timekeeping system and eliminate paper shuffling related to attendance reporting and	In Progress	(\$100,000)	\$0	\$0	The installation of Kronos was completed in the Transportation Department. Currently, the Transportation and

	investigate using the system in each of the schools for purposes of timekeeping, security, as a keycard and as a smartcard. p.324					Payroll departments are working towards the automation of payroll documents. This will allow the Transportation Department to use reports generated by Kronos as source documents to support payroll data entry. The system will be implemented in other departments.
96	Eliminate the check writing process at the school site and require all checks to be issued by the central office. p.328	In Progress	\$0	\$0	\$0	The district is in the process of implementing Bank of America's purchasing card. Obstacles have been encountered due to Region 20's system and the bank's limitations on fields that will accept TEA's account code structure. This will eliminate the need for checks at the campuses.
97	Modify the district organizational structure so that the internal auditor reports to the audit committee of the Board of Trustees. p.334	In Progress	\$0	\$0	\$0	The internal auditor reports directly to the superintendent with a dashed line of responsibility to the Board of Trustees. Formerly, the internal audit reports stopped at the superintendent. Now, the

						superintendent sends the reports to the board. The board and superintendent understand the value of the internal audit function and are working together to ensure the independence of the internal auditor and the integrity of the internal audit reports.
98	Improve the internal audit plan by incorporating risk assessments and a discussion of overall audit objectives. p.337	Complete	\$0	\$0	\$0	On May 8, 2000, the board approved the audit program process for scheduled audits to be conducted during the year. Each audit program includes audit procedures and objectives. A separate area of the audit plan lists the scored risk assessments performed for 31 different areas of the district. The risk assessments determine the priority for the audits that will be undertaken for the year. Risk assessments have been performed annually for the past six years.
Total - Chapter 7			\$556,000	\$7,260,896	\$36,322,011	
Chapter 8: Purchasing and Contract Management						

99	Purchase and use an automated purchasing system. p.347	In Progress	(\$50,180)	\$0	\$0	An automated system from eSchoolmall is under consideration. Staff is verifying and validating the system by calling school districts using and implementing the system. The \$24,000 cost for the system in the first year is lower than the amount estimated by TSPR. The district plans to keep staff for the next one to two years, but the administration believes that eventual savings from staffing reductions will more than offset the cost of implementing the system.
100	Issue procurement cards for staff purchases from local vendors. p.349	In Progress	\$0	\$0	\$0	The district is in the process of implementing Bank of America's purchasing card. Obstacles have been encountered due to Region 20 ESC's system and the bank's limitations on fields that will accept TEA's account code structure. But when all of these

						bugs are worked out, the district will be able to eliminate emergency checks at the campus level, paperwork will be reduced and controls over purchasing will be improved through built-in limits on cards. Further, the district believes the cards will also save money on travel expenditures since travel can then be booked over the Internet at discounted rates.
101	Select vendors based on quality of goods, costs and discounts given. p.353	In Progress	\$0	\$0	\$0	The automated purchasing system from eSchoolmall includes a bid system that will allow the Purchasing Department to select vendors based on quality of goods, costs and discounts.
102	Require departments and schools to provide systematic, detailed justifications to the board as to why bid vendors are recommended. p.354	Complete	\$0	\$0	\$0	Recommendation letters from department heads and principals offer in-depth, detailed information such as what is being purchased, why the purchase is being made, who will benefit from the purchase and how

						the purchase will be funded.
103	Eliminate the supply operations of the Purchasing and Textbook Warehouse. p.360	In Progress	\$1,525,279	\$0	\$0	During the summer of 2000, the district phased out the office supply items carried in the warehouse. Campuses and departments can order office supplies from Office Depot via the Internet or a local vendor. Supplies are delivered directly to campuses and departments. The warehouse inventory was distributed to the campuses; therefore, the district did not realize any additional revenues as a result of this move.
104	Enforce take-home book policies and adopt new penalties to hold students and parents accountable for lost, stolen and damaged textbooks. p.366	In Progress	\$0	\$0	\$0	A draft administrative policy regarding textbook management and accountability has been created. Approval of the policy will require input and suggestions from the Principal's Advisory Committee.
105	Develop an in-house training program on contract	In Progress	\$0	\$0	\$0	The Finance Office plans to conduct training during

	management for all department heads and other school personnel who are responsible for managing projects. p.368					three principal summits and high school cluster meetings that will be held during the summer of 2001. The Funds Management Office is available to district staff for individual training and assistance.
106	Establish a schedule for reviewing outsourcing opportunities using the component activities identified by this report, and assess whether there is a cost benefit to having a local vendor provide the service rather than the district. p.376	In Progress	\$0	\$0	\$0	The district created a task force in the Spring of 2000 to look at possible outsourcing opportunities. The task force met with strong opposition and the initiative has been placed on hold.
Total - Chapter 8			\$1,475,099	\$0	\$0	
Chapter 9: Management Information Systems						
107	Develop a set of formal, written performance measures to monitor the effectiveness and efficiency of services provided by the Technology Department. p.387	Complete	\$0	\$0	\$0	The following metrics were implemented during the period 6/15/00 to 3/1/01: <ul style="list-style-type: none"> • All open calls • Open calls by days open • Open calls by priority • Current call status • Call analysis • Information by

						<ul style="list-style-type: none"> • customer • Technician statistics • Call status by individual • System status • Priority calls by call type • Open calls by group • Calls closed today by group <p>The HEAT System Manager's Console and Answer Wizard have been implemented and are being used by department heads to track predefined and custom metrics based on need.</p>
108	Revive the Technology-User Committee and ensure that it meets on a regular basis. p.389	Complete	\$0	\$0	\$0	The Long-Range Technology Committee completed its work for 1999-2000 and met in September 2000 to review a draft of the technology plan. Additionally, with the advent of the district's Vision 2005 plan, the committee will reconvene in August 2001 to develop an

						implementation plan for the approved enhancements. The district has also agreed to look into forming a user committee to participate in more day-to-day planning and training activities.
109	Formalize the process for determining which schools will be wired each year, what funding sources will be used and what the specific implementation timeframe for each school will be. p.393	Complete	\$0	\$0	\$0	A schedule was developed by which all schools are being cabled with either bond funds or e-rate funds. The e-rate-funded schools will be completed by July 2001, and the bond-funded schools will be completed by 2003. The bond-funded schools will be cabled in the order in which the bond-funded program is implemented.
110	Define the roles of the Technology Department and the Finance Department in providing training to users on the financial systems and provide formal training on a regular basis. p.397	Complete	\$0	\$0	\$0	MIS is now responsible for the technical training and Finance conducts training on the financial issues. MIS will continue to work closely with the Finance Department to assist with end-user training as needed.

111	Purchase software to allow teachers to record grade and attendance information on their classroom computers. p.398	In Progress	\$1,028,680	\$0	\$0	The district's Vision 2005 Plan includes the Automated Data Management System Initiative, which includes student services. Implementation of grade book software was attempted by getting the necessary funding via a TIE grant, but the grant funds were not awarded. An electronic grade book will be included in the system specifications for student services. The initiative depends on the board's approval and the availability of funds.
112	Develop a training program to systematically train end-users in the use of data analysis tools developed by the SAISD Technology Department. p.401	Complete	\$0	\$0	\$0	Active Quest (AQ) and GL Browser are prominently featured as quick links on the SAISD home page. MIS re-introduced the district-developed web applications during meetings held in August 2000. MIS also presented AQ features during the Leadership Development Academy. AQ presents aggregate

						information in electronic school profiles and graphs of membership and attendance without requiring subscriber password access; these features are used by hundreds of staff. MIS web applications have been designed so that users do not require training to make use of the applications. MIS also included an overview link for AQ to introduce users to the features.
113	Purchase software and incorporate student TAAS data reports per school into the existing ActiveQuest product. p.402	Not Implemented	(\$9,700)	\$0	\$0	Presently, central office testing staff prepare TAAS reports and distribute them to the campuses. The individual schools do not have technology support personnel on their campuses to program, run and modify customized reports. The schools report that the existing TAAS reports provide all the data that they need for evaluation purposes. The Curriculum Management System, a Vision 2005 initiative,

						will include the capability for teachers and campuses to analyze their own TAAS data in a variety of formats.
114	Provide training on the full reporting and management analysis capabilities of the HEAT and Seagate software products. p.407	Complete	(\$2,500)	\$0	(\$13,200)	Two staff members have attended the week-long HEAT and Crystal reports training. SAISD was able to implement the HEAT administration modules for tracking metrics- Answer Wizard and Manager's Console. Answer Wizard is a query and reporting tool using Crystal reports that comes with 275 predefined reports and tracking tools for current and trend statistics. A few categories tracked are current status, call analysis, customer information and technician statistics. Manager's Console is a management tool used by the department to get current workload information in real-time to define metrics, set thresholds, see

						<p>statuses on critical issues and set notifications when thresholds are crossed. The district currently tracks open calls, open calls by priority, call status by individual, system status, priority calls by call type, open calls by group and calls closed today by group. Adjustments are being made to the work order tracking process as time allows. The district administrators are establishing procedures and modifying processes to help accurately track and manage work orders for staff.</p>
115	<p>Stagger the hotline's hours of operation between 7:00 a.m. to 5:00 p.m. to allow for more coverage to receive customer calls. p.408</p>	Complete	\$0	\$0	\$0	<p>Since the Technology Help Desk has recently been fully staffed, SAISD has adjusted the Help Desk hours to 7:30 a.m. - 4:30 p.m. The district has tested the call rates at the extended hours of 7:00 - 7:30 and 4:30 - 5:00 and received few calls, even when these pilot</p>

						hours have been publicized. The new Help Desk hours cover the current operating hours of the district. Additionally, the new hours allow time for staff to enter work requests and follow up on pending items.
Total - Chapter 9			\$1,016,480	\$0	(\$13,200)	
Chapter 10: Transportation						
116	Reorganize the Transportation Department by creating one senior and two route supervisor positions, and eliminate the positions of the assistant director of Transportation, two route coordinators and three clerks. p.419	Rejected	\$248,805	\$0	\$0	The district's review indicated that these positions have more responsibilities than are reflected in the report. For example, the positions are responsible for the development and maintenance of local and special education routes and for the routing of field trips. The department is in need of a floating field compliance supervisor to supervise both shifts in the field. This additional position could also allow for complete coverage for all of the operating hours of the department. This position is still under

						consideration.
117	Purchase a two-bay maintenance facility. p.422	In Progress	(\$250,000)	\$0	\$0	Lanier High School has a vehicle repair program with 23 bays. Day and evening students are available to maintain school buses as part of their instruction. Negotiations are underway to contract for service through the Lanier program, which could potentially provide savings to the district and real-life experience and income for the students in the program.
118	Hire two mechanics and one mechanic/apprentice. p.423	In Progress	(\$497,250)	\$0	\$0	If the cooperative program with the Lanier High School vehicle repair programs can be negotiated successfully, it will provide current mechanics additional time for other vehicles, thereby eliminating the need to hire additional staff.
119	Provide ASE certification training for all SAISD mechanics. p.424	In Progress	(\$2,900)	(\$5,000)	(\$25,000)	The department has been working on voluntary ASE testing for the mechanics for more than four years. The department has

						provided study material for each of the tests to all interested mechanics. In addition, as specialized training seminars are available, the department pays the fees for mechanics to attend the seminars. To strengthen the program, however, the district is revising the job description for new hires to include ASE certification as a requirement.
120	Institute a spare bus policy and sell excess buses based on the adopted policy. p.425	Not Implemented	\$22,000	\$0	\$0	The district has not developed a policy and is currently using any excess buses that are not working for parts.
121	Use the computer-based route scheduling software for all routes. p.427	In Progress	(\$3,000)	\$0	\$0	The Transportation Department is in the process of implementing the ZEPKO Tracking System, which was purchased by the district some years ago, but not implemented. This system will allow the department to evaluate the cost effectiveness and efficiency of bus routes. Additionally, the department has

						issued a request for proposals (RFP) to update bus routing software so that it can be used for all routes.
122	Establish a 15 year bus replacement cycle. p.429	Complete	(\$535,000)	(\$825,000)	(\$4,125,000)	The department has developed a replacement plan. Through this plan, high maintenance and mileage vehicles were identified for replacement. This plan is highly contingent on the availability of funds.
123	Establish a police vehicle replacement policy. p.430	In Progress	(\$35,000)	(\$129,000)	(\$221,000)	The administration has recommended the purchase of eight patrol cars and three vans for approval by the board. The replacement plan calls for the evaluation of vehicle replacement on an annual basis in conjunction with the budget development process. An inventory list of vehicle age and mileage is maintained within the department.
124	Develop and implement a bus driver training program. p.432	In Progress	(\$2,250)	(\$51,250)	(\$256,250)	The department has submitted, as a fiscal 2002 budget enhancement, to add a position to

						develop the bus driver training program. Region 20 ESC is used as a source for bus driver certification and recertification, and other training needs.
125	Develop performance indicators to measure and monitor the performance of the district's transportation operations. p.434	In Progress	\$0	\$0	\$0	The Transportation Department has reestablished the implementation of the ZEPSCO Tracking system. This system will be able to provide cost efficiency data, bus idle time, run time and down time. This data and other data such as on service, incidents, accidents, maintenance and special programs will be used to monitor and evaluate performance.
126	Purchase electronic diagnostic tools. p.436	Complete	(\$2,750)	(\$3,274)	(\$3,274)	SAISD purchased the "ShopKey" electronic repair database. The department has determined that no other tools are necessary at this time.
127	Conduct a privatization feasibility study for the outsourcing of school transportation services. p.438	Complete	\$0	(\$450,000)	(\$2,250,000)	The district has determined that current needs for additional routes will be obtained through an

						interlocal agreement with VIA. VIA has agreed to provide an additional 10 buses for the morning routes and 15 buses in the afternoon for an approximate cost increase of \$450,000. This decision was based on the number of bus driver vacancies, insufficient bus driver pool to fill vacancies and other operational factors.
128	Outsource the maintenance of district police vehicles. p.439	In Progress	\$107,000	\$0	\$0	The Transportation Department and Lanier High School are currently working on an agreement for vehicle repair services. This will allow the department mechanics more time for police vehicles.
Total - Chapter 10			(\$950,345)	(\$1,463,524)	(\$6,880,524)	
Chapter 11: Food Service						
129	Solicit bids from various vendors to determine the best value for an automated point-of-sale system. p.449	In Progress	(\$50,000)	\$0	\$0	A budget enhancement for 2001-02 has been requested to begin this project at a future date.
130	Develop and implement strategies to increase breakfast participation in all	In Progress	\$755,200	(\$223,640)	\$531,560	The current year breakfast participation decreased from

	middle and high schools. p.454					prior years. The Food Service Department has initiated special menus to increase participation on low attendance days in the high schools and will add middle schools in 2001-02. During summer 2001, the district will meet with principals, students, parents and food managers to evaluate food presentation, menus, etc. The Food Service Department will continue to add new items to the promotional calendar.
131	Enforce federal regulations prohibiting competitive food sales during meal times. p.456	In Progress	\$0	\$0	\$0	The Food Service Department will continue to monitor enforcement of federal regulations. The district has adopted a policy to restrict sales of high sodium and high acid foods of minimal or non-nutritional value.
132	Provide training on quantity food preparation and ordering for managers whose cafeterias run out of food choices. p.458	Complete	\$0	\$0	\$0	Food Production record-keeping classes were mandatory for all managers (August and October 2000). Classes will continue on an

						annual basis.
133	Eliminate two full-time truck-driver helper positions employed by the Food Service Warehouse. p.463	Rejected	\$187,575	\$0	\$0	A review of the driving and unloading of trucks was conducted and findings indicated that a helper was needed because drivers cross the path of children on a daily basis. If driver-helpers have a CDL license, they can assist with the driving and with additional duties in the Food Service Department.
134	Include Food Service Department representation on planning committees for school renovations. p.464	Complete	\$0	\$0	\$0	Construction Management and the Food Services Department are working in conjunction on all projects.
135	Limit access to school kitchens to principals and Food Service personnel. p.464	In Progress	\$0	\$0	\$0	Access to campus kitchens is being monitored through Food Service managers. This issue has been addressed with all principals.
136	Develop and implement a replacement plan for Food Service equipment. p.465	In Progress	(\$550,000)	(\$500,000)	(\$600,000)	The Food Service Department is currently replacing equipment by age of equipment and condition. In addition, the department is concurrently working with Construction Management on

						remodeling new kitchens. A plan is being developed to determine a timeline for replacement of Food Service equipment.
137	Contract for food service equipment repair. p.467	In Progress	\$0	\$0	\$0	The Food Service Department has a maintenance foreman and three repair technicians for repairs of Food Service equipment. The staff is presently under the supervision of the Food Service Department. Repairs are contracted to outside services as needed. This has improved the process. The status of repairs is reviewed through weekly meetings with Food Service repair staff.
Total - Chapter 11			\$342,775	(\$723,640)	(\$68,440)	
Chapter 12: Safety and Security						
138	Require each school to complete a security threat assessment of its campus and enforce better physical security measures. p.478	Complete	\$0	\$0	\$0	A campus security assessment has been completed. Exterior doors and alarms have been checked and are secure. Additional motion sensors are scheduled to be installed. High school and middle school vault doors have been rekeyed.

						A summer safe storage procedure has been implemented in all schools. School security procedures, including a requirement for a campus-based security committee, is currently in final draft form.
139	Establish a districtwide badge system to promote greater security. p.480	In Progress	(\$35,698)	\$0	\$0	This recommendation is being evaluated in conjunction with the Campus Operations, Technology and Finance departments. ID software programs available for purchase are not compatible with the current district technology system. Currently, all schools follow established procedures for monitoring visitors to the campuses.
140	Develop and implement campus-level guidelines for alarm access codes. p.481	Complete	\$0	\$0	\$0	The Change of Principalship procedure is in place for access code changes due to staff adjustments. In addition, this information will included in the Campus/Facilities

						Security procedure that is in draft form.
141	Reduce the number of school master keys in circulation and implement effective key control. p.482	Complete	\$0	\$0	\$0	Police Chief approval is required on all requests for replacement of existing master keys.
142	Revise the common template for school emergency preparedness plans, require all schools to use the template, and require annual training in school-level crisis response, beyond regular fire drills. p.486	Complete	\$0	\$0	\$0	The District Crisis Plan and standardized School Crisis Template were revised before the start of school in 2000. Police Department staff provide annual training to campuses and departments.
143	Seek grant funding for the anticipated cost of the new radios needed to take advantage of the new communication system being installed by the City of San Antonio. p.491	In Progress	\$0	\$0	\$0	The district contacted the City of San Antonio and, as of May 7, 2001, the information is not available. The city pilot project is at least one year away from initiation.
144	Develop a comprehensive security plan and a police department strategic plan including performance and cost-efficiency measures. p.493	Complete	\$0	\$0	\$0	The SAISD Police Department has established a departmental five-year plan, which is supportive of the District's Vision 2005 Plan and includes performance standards and cost efficiency

						measures.
145	Remove all weapons and ammunition from patrol cars that are not in service and store them properly in a secure arms room. p.494	Complete	\$0	\$0	\$0	The SAISD Police Department has established a standardized checkout procedure when vehicles are placed out of service.
146	Hire three peace officers for extracurricular events and for regular patrols, and reduce overtime costs for school events. p.496	In Progress	\$138,572	\$0	\$0	During the 2000-01 school year, the district received a grant for 10 additional officers and it intends to schedule existing officers to eliminate the need for overtime for extracurricular events. Unfortunately, five officers were hired, but seven officers resigned. The district anticipates hiring five additional officers by September 1, 2001. In the interim, overtime security needs are being evaluated and closely monitored for cost efficiency purposes.
147	Redeploy school-based peace officers annually based on demonstrated need. p.499	Complete	\$0	\$0	\$0	The assignments of police officers are reviewed annually. Consideration is given to the individual and varying needs of the schools based on level (high,

						middle or elementary), student enrollment and local neighborhood issues. Campus security coverage is adjusted as needed for emergencies and other temporary conditions.
148	Revise the DARE program to target elementary school students, conduct annual program evaluations and, based on evaluation results, obtain grant funding to continue the program. p.501	Complete	\$936,000	\$225,264	\$1,126,320	The DARE program has been discontinued in SAISD. Recent research conducted indicated that this program has not performed up to expected levels.
149	Provide additional training to principals on discipline management. p.505	In Progress	\$0	(\$450,000)	(\$1,000,000)	One of the initiatives listed in Vision 2005 is to consistently implement a districtwide approach to discipline management and develop a climate of mutual respect for the rights of all persons. This training would not only be for principals, but for everyone in SAISD. The district is currently evaluating discipline management systems for purchase, and

						estimates are based on training every district employee.
150	Establish procedures to improve ADA and attendance rates. p.508	Complete	\$2,019,070	\$600,000	\$3,000,000	The implementation of systemic initiatives has resulted in reversing the dwindling student attendance trend of the past. It is projected that the final ADA for 2000-01 will result in an increase of 1,000 students. For the 2000-01 school year, eight additional school attendance auditors were allocated to the campuses to assist in working with parents to ensure a reduction of the school dropout rate and the increase in student attendance. Americorps volunteers, City Year volunteers and other outside service organizations and agencies also provide services to reduce the dropout rate. The cost of \$400,000 for the auditors, subtracted from the anticipated additional \$1 million ADA, nets an annual savings

						of \$600,000.
151	Enforce the dress code in all schools. p.510	In Progress	\$0	\$0	\$0	During the 2000-01 school year, the superintendent discussed enforcement of school uniforms at Principals' Meetings. The superintendent stressed to principals that these standards are policy and must be enforced campuswide. Principals are now being held accountable through their performance evaluations for monitoring and enforcement of district policies.
152	Monitor more closely the dispensation of student cases resulting from Level III or IV code of conduct violations. p.514	Complete	\$0	\$0	\$0	Last year, the Hearing Officers entered all Critical Incident Reports into a special database created for tracking purposes, but this proved to be burdensome. In its place, the Hearing Officers are now using an email-based procedure for acknowledging and documenting incidents so that documentation on cases, both those that result in a hearing and those

						that do not, is being maintained. The reports of actual hearings and dispensations are provided to the area superintendents for monitoring purposes.
153	Reassign the students, district-funded teacher and teacher assistant positions from the Salvation Army Center to area schools. p.515	Complete	\$0	\$0	\$0	The Salvation Army Center classroom unit was closed January 2000. The students and staff were reassigned to other schools in the district.
154	Outsource the JDC program to a private company. p.516	Rejected	\$674,212	\$0	\$0	The Juvenile Detention Center (JDC) serves students who are incarcerated as juveniles. JDCs are residential facilities and the students are not allowed to leave the facility to attend school. Classroom instruction must be provided at the JDC. Since the facility resides within the SAISD boundaries, the Texas Education Code dictates that the educational programs for all of the students are the responsibility of SAISD, regardless of where the

						student previously resided. Therefore, all students placed in the JDC are enrolled as SAISD students for both instruction and attendance reporting to the state. This program is being run efficiently and no changes are being implemented. For the 2000-01 school year, the expenses for the JDC were \$585,940. For this same period, ADA revenue for student attendance was \$601,200.
	Total - Chapter 12		\$3,732,156	\$375,264	\$3,126,320	
	TOTAL		\$25,168,906	\$6,171,385	\$34,781,862	